

# IIT Cognos Portal Librarian Guide

## 1.0 About the Cognos Portal

The IIT Cognos Portal allows users to access reports and perform analysis based on data stored in the SunGard Banner Operation Data Store (ODS) and Enterprise Data Warehouse (EDW). Reports and queries can be authored using the Cognos tool set (i.e., Query Studio, Analysis Studio, and Report Studio).

The IIT Cognos Portal is organized into four distinct tabs: My Folders, Report Libraries, Shared Reports and Resources. Users of the Portal are assigned a role within the system. The role determines which tools the user has access to.

Data required to run and author reports is made available through various data packages (ODS) and data cubes (EDW). Security access to these SunGard Banner packages and cubes will determine which data a user has access to.

This document describes the Cognos user roles and how to use the four portal tabs. It also includes step-by-step instructions for changing the order of the tabs, changing your view preferences for each tab, deleting files from the tabs, creating and deleting folders, and creating and deleting shortcuts.

## 2.0 Cognos User Roles

IIT has established four Cognos user roles. Each role has access to different report tools. The roles are Report Viewer, Query User, Report Author and Report Librarian. These roles are combined with security access to data packages, cubes and folders to define a user's overall access to the system.

- **Report Viewer** - Can only run existing reports and queries. Does not have access to create new reports or queries using the Cognos reporting tools.
- **Query User** – Has access to Query Studio, Report Studio Express and Analysis Studio. Can create queries and reports in Query Studio and Analysis Studio.
- **Report Author** – Has access to Report Studio, Query Studio and Analysis Studio.
- **Report Librarian** – Has access to Report Studio, Query Studio and Analysis Studio.

The Report Librarians also perform tasks such as adding reports to the Report Libraries from the Shared Reports tab, developing and storing new reports for the university in the Report Libraries, managing the content of the Shared Reports tab, setting up new users in Cognos and providing security access to data packages and

data cubes. More information about security access to data packages and cubes can be found in the next section of this document. The identify of the Report Librarians and the data packages assigned to each librarian is available at: <http://oii.iit.edu/ods/> and will soon be accessible from the Cognos Portal Resources tab (described in section 5.4 below).

Individual users were assigned to roles based on the number of licenses available and in consultation with department heads. If a department wishes to purchase additional licenses, a person with budget authority in the department should send an email to the IIT Office of Technology Services (OTS) Support Desk ([support@iit.edu](mailto:support@iit.edu)) to request additional Cognos licenses. The email should include the type of license (i.e., Report Studio or Query/Analysis Studio), the name of the user for each license, and the fund, organization, account and program (FOAP) codes to which the licenses are to be charged.

### **3.0 Access to Data Packages and Cubes**

Security access to data packages from the Banner Operational Data Store (ODS) and data cubes from the Banner Enterprise Data Warehouse (EDW) is obtained by request to the Data Security Team. The identity of the Data Security Team members is available at: <http://oii.iit.edu/ods/> and will soon be accessible from the Cognos Portal Resources tab (described in section 5.4 below).

The following sections describe the responsibilities of IIT Employees who have access to IIT administrative data.

### **4.0 Confidentiality (FERPA) Guidelines and Responsibilities of IIT Employees**

The guidelines set forth below define the responsibilities of everyone accessing and managing data for IIT. Offices may have individual guidelines that supplement, but do not supplant or contradict, the guidelines set forth below. Data entrusted to IIT by other organizations (e.g., testing companies, lenders, and government agencies) is governed by terms and conditions agreed upon with those organizations. Specific issues not governed by such agreed upon terms shall be governed by the guidelines set forth below.

#### **4.1 Confidentiality Guidelines**

In accordance with the 1974 Family Education Rights and Privacy Act (FERPA), and to ensure maximum safeguards against indiscriminate distribution of information contained in students' records, only authorized IIT personnel will disclose information of a confidential nature (i.e., information not normally available to the general public). This information may be disclosed only to the student himself or herself, to a parent or guardian claiming that student as a dependent (as demonstrated by providing a copy of the parent or guardian's most recent Federal income tax return), or to a third party upon receipt of a written release signed by the

student.

Certain exceptions to this include IIT school officials<sup>1</sup> who have a legitimate educational interest<sup>2</sup> in the records, organizations conducting studies for educational and governmental agencies or offices in connection with the student's application for receipt of financial aid, governmental officials as identified by Public Law 93-380, and an appropriate official in response to a court order or subpoena. Without a signed release, the university can make only "directory information"<sup>3</sup> available for public use in campus directories and publicity of events.

#### *4.2 Responsibilities of IIT Employees with Respect to Institutional Data*

Employees must adhere to any applicable Federal and state laws covering storage, retention, use, release, and destruction of data. All department heads are responsible for ensuring that staff members in their department know what these laws require and adhere to these requirements.

Supervising administrators shall ensure a secure office environment with regard to all institutional information systems. Administrators shall validate the access requirements of their staff according to job functions before submitting requests for the provision of data access on behalf of their staff. Except as described in the Confidentiality Guidelines set forth in Section 2.1 above, under no circumstances shall anyone use institutional electronic data (in detail or summary) in any publication, seminar, or professional presentation, or otherwise release data, in any form, outside the university without prior written approval from an appropriate security officer. Data should never be left on any system to which access is not controlled.

Electronic data are owned by the university and are vital assets. All institutional data, whether maintained in the central database or copied into other data systems, including personal computers, remain the property of IIT. Access to data is not approved for use outside an individual's office university responsibilities. Computerized institutional data shall be used only for the legitimate business of IIT. Institutional computing services and facilities shall be used only as required in the performance of job functions.

As a general principle of access, university data (regardless of who collects or maintains it) shall be shared among those employees whose work can be done

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<sup>1</sup> School officials shall be deemed to include member of the IIT's faculty and administrative staff who have a legitimate educational interest in such records and other personnel whose duties involve establishment and maintenance of such records and development of institutional reports.

<sup>2</sup> A "legitimate educational interest" shall be deemed to mean having a direct involvement in establishing or reviewing a student's academic record or performance.

<sup>3</sup> The following constitutes directory information: name of student, date and place of birth, dates of attendance at IIT, local address, phone number and email address of student, home address and phone number of student, positions held, place of employment, and extension number of students currently employed at IIT, department of specialization and educational level (undergraduate, non-degree-seeking student, graduate student in Master or Ph.D. program), membership in officially recognized campus organizations and on teams, offices held in such organizations, degrees earned and special awards and recognition given, photograph of student.

more effectively by knowledge of such information. Although the university must protect the security and confidentiality of data, the procedures to allow access to data must not unduly interfere with the efficient conduct of university business.


All information systems owned by IIT shall be constructed to assure that:

1. Accuracy and completeness of all system contents are maintained during storage and processing.
2. System capabilities can be re-established within an appropriate time after loss or damage by accident, malfunction, breach of security, or natural disaster.
3. Actual or attempted breaches of security can be detected promptly and controlled.

All who use IIT institutional data have the right to expect the data to be accurate.

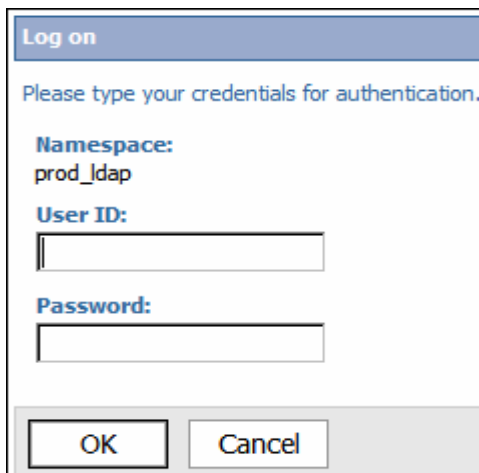
## 5.0 Logging in to Cognos

Users who have been granted access to one or more of the Cognos suite of tools (i.e., Viewer, Query Studio, Analysis Studio, or Report Studio) can log into Cognos through myIIT.

1. Click the Cognos icon  at the top of the screen.



2. On the log in screen, enter your myIIT user name and password.



Log on

Please type your credentials for authentication.

Namespace:  
prod\_idap

User ID:

Password:

OK Cancel

3. Click OK.
4. Select My home. You will be taken to the portal tabs.

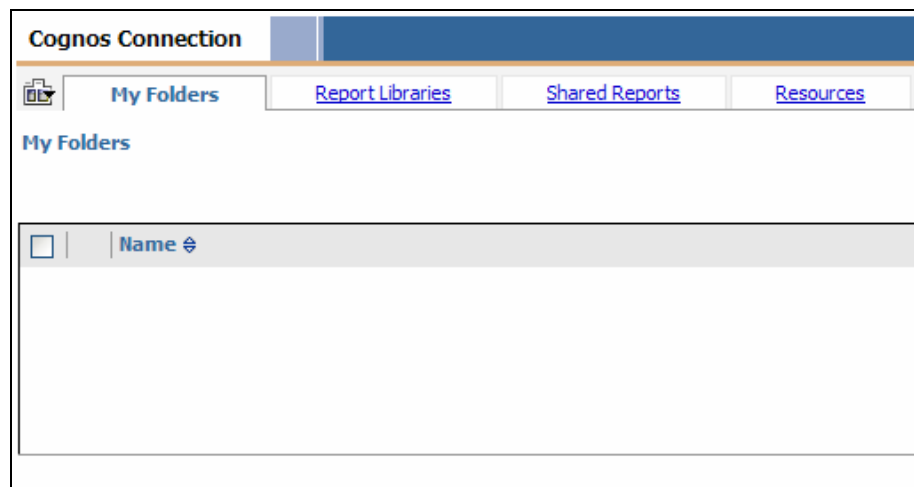


## 6.0 How to Use the Cognos Portal Tabs

### 6.1 My Folders

My Folders tab is a private tab that only the logged-in user has access to. This tab is to be used to store report queries created by the user. It can also be used to save shortcuts to other reports and save any other personal content desired. However, *to maintain the performance of the Cognos server, users are strongly encouraged to save the output of report queries to another server.* To protect the confidentiality of data (see section 4.0 for a discussion of data confidentiality and the responsibilities of IIT employees), users are not to save data that contains individual identifying information on their desktop or laptop computers.

Users may create folders to further organize the items stored in My Folders.

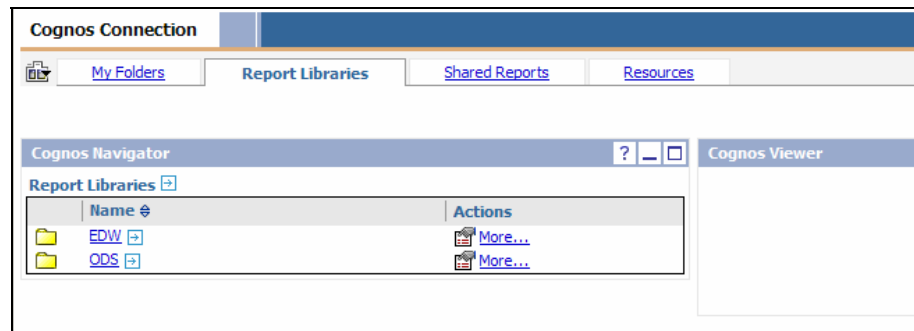


## 6.2 Report Libraries

Report Libraries is a public tab that contains a Library of official University reports. These reports are organized into folders. These folders are named according to the Banner package that is the source of the reports.

Access to the various folders in the library is controlled through Cognos security. Only folders to which the user has been granted access can be viewed by the user.

Users can run reports from this location but they cannot edit the reports. The report Librarian is responsible for managing the reports in the Report Libraries. Report Librarians are the only ones able to save reports to this location. If a user needs to save a report for personal use it should be saved to the My Folders tab. If the report will be shared with other users that have access to the same data package, the report should be saved to the Shared Reports tab.

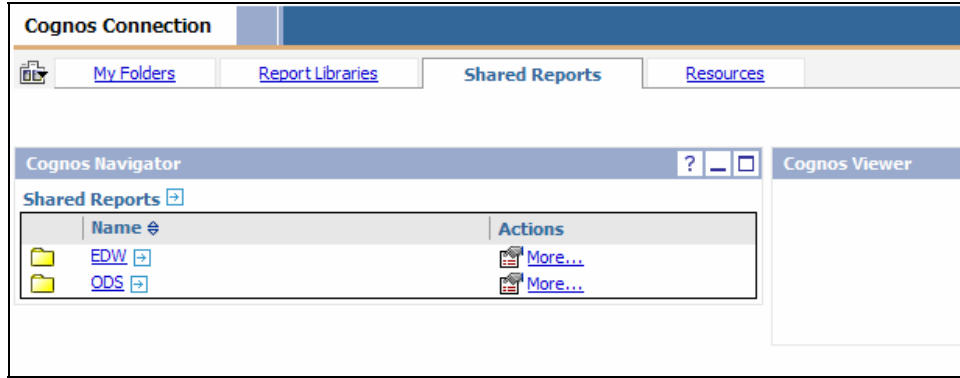


## 6.3 Shared Reports

Shared Reports is a public tab that allows users to share reports with other users. The reports are organized into folders and the folders are named according to the Banner source package.

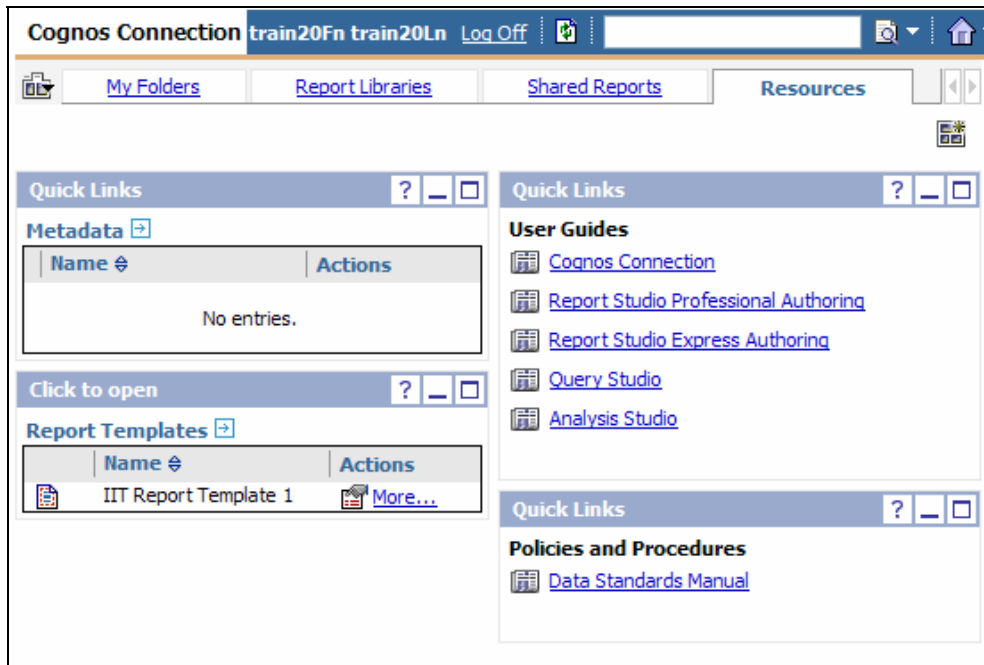
The folders which the user has access to is controlled through Cognos security. Only folders, to which the user has been granted access, can be viewed by that user. In order for another user to access a report in this tab, that other user must have access to the same folders (and data packages) within the tab.

The main difference between the Report Shared Reports tab and the Libraries tab is that the users create and manager the contents of the Shared Reports tab.



### 6.4 Resources


Resources is also a public tab that provides access to Metadata, User Guides, Report Templates and Policies & Procedures for data access and reporting. The content of this tab is controlled by the university and cannot be edited by users.

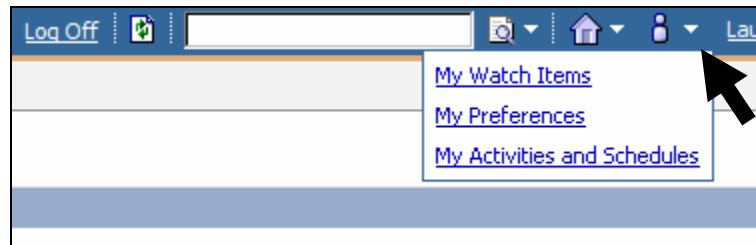


## 7.0 Step-by-Step Instructions for Using the IIT Cognos Portal

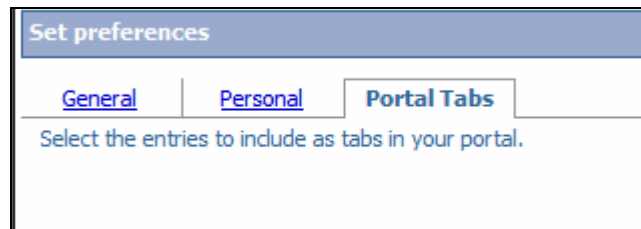
### 7.1 Modifying the Sequence of the Tabs in Your Cognos Portal

To modify the sequence or order in which the tabs appear in your Cognos Portal:

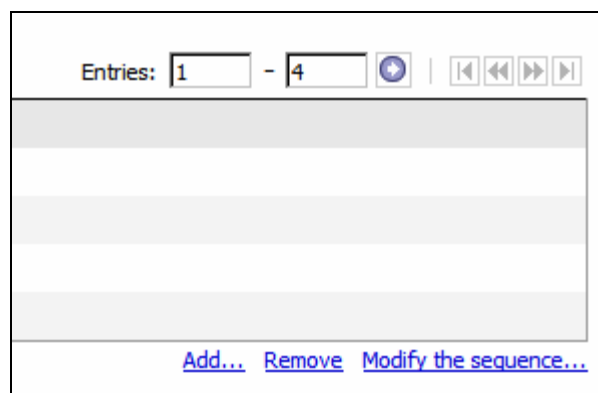
1. Click on the down arrow beside the My Area icon  to expand the My Area menu.



2. Click on My Preferences.
3. Open the Portal Tabs tab.

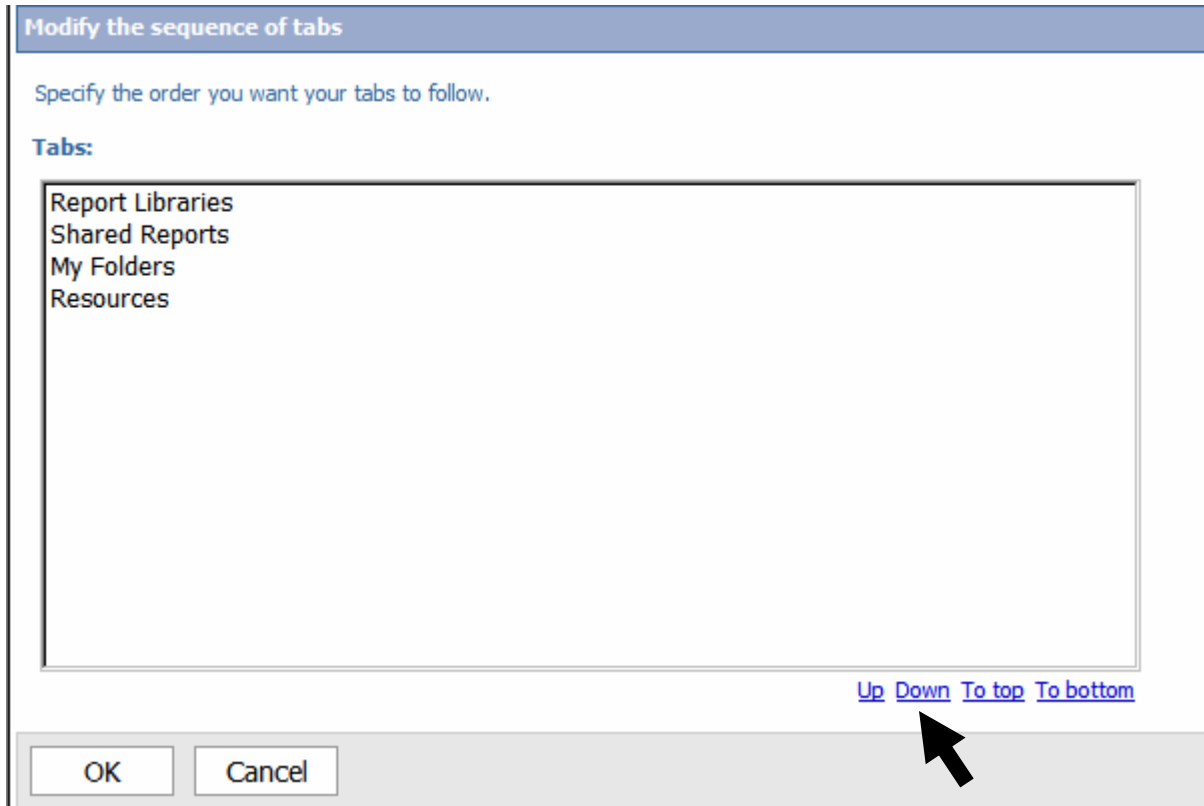


4. Click on Modify the sequence... in the lower right-hand side of the screen.





- Highlight the tab you wish to move and use the Up, Down, To top, and To bottom buttons to change its position in the tab sequence.

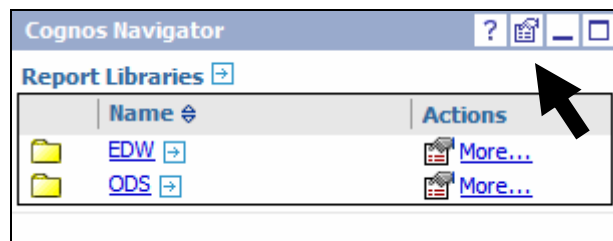


- When the tab names appear in the desired sequence, click OK.

## 7.2 Modifying Your View Preferences for a Tab

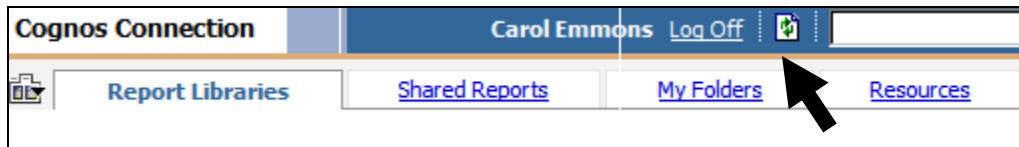
To modify your preferences for a tab:

- Under the Cognos Navigator channel, click on the Edit icon.



- Scroll to the bottom of the Set the Properties – Cognos Navigator page.
- Click on the drop-down box under Separators.
- Click on Alternating Backgrounds.
- Click on OK.

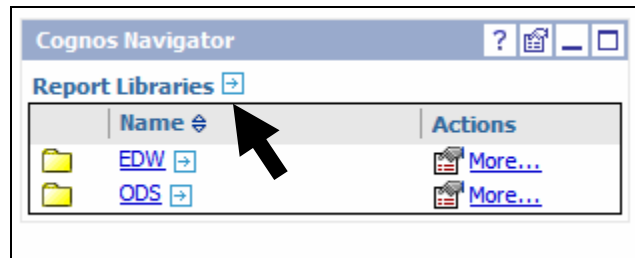
- Click the Refresh icon on the top toolbar to see changes.



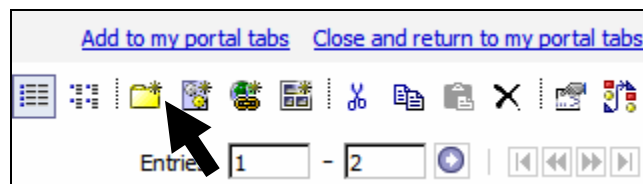
### 7.3 Creating a Folder in a Tab

To create a folder in Cognos Navigator channel:

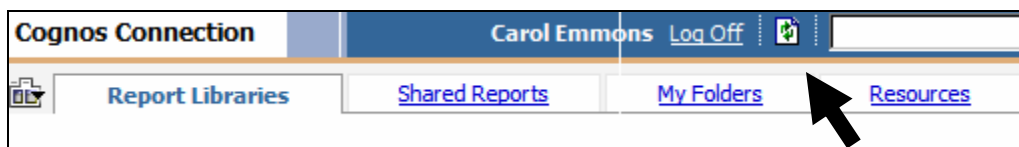
- Under the Cognos Navigator channel, click on the arrow next to the channel name (e.g., Report Libraries). A separate window should pop up.



- Click on the New Folder icon.



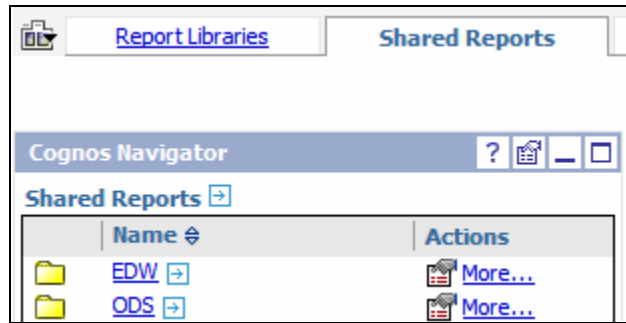
- Enter the name of the new folder in the Name field.
- Click Finish.
- Click the Refresh icon on the top toolbar to see changes.



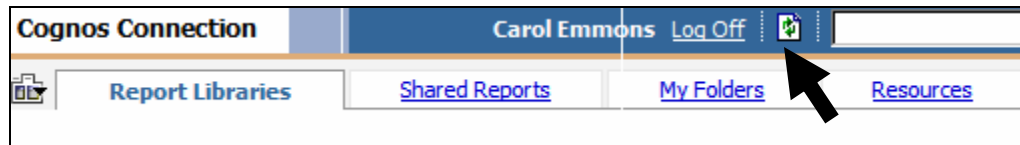
## 7.4 Deleting a Folder from a Tab

To delete a folder from a tab:

1. Under the Cognos Navigator channel, click on the More link next to the folder you wish to delete.



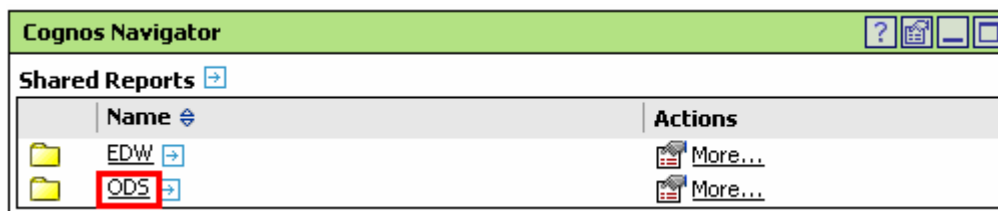
3. Click Delete.
4. Click OK.
5. Click the Refresh icon on the top toolbar to see changes.



## 7.5 Creating a Shortcut in a Tab:

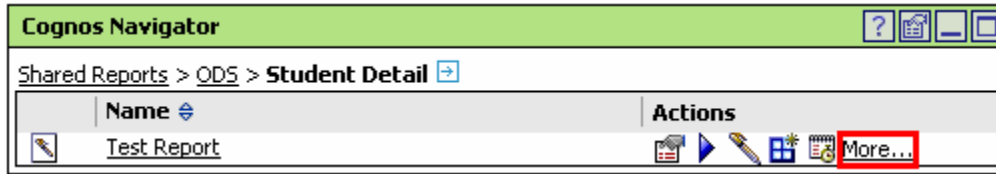
To create a shortcut in a tab to a report in a different tab:

1. Under the Cognos Navigator channel, click on ODS.

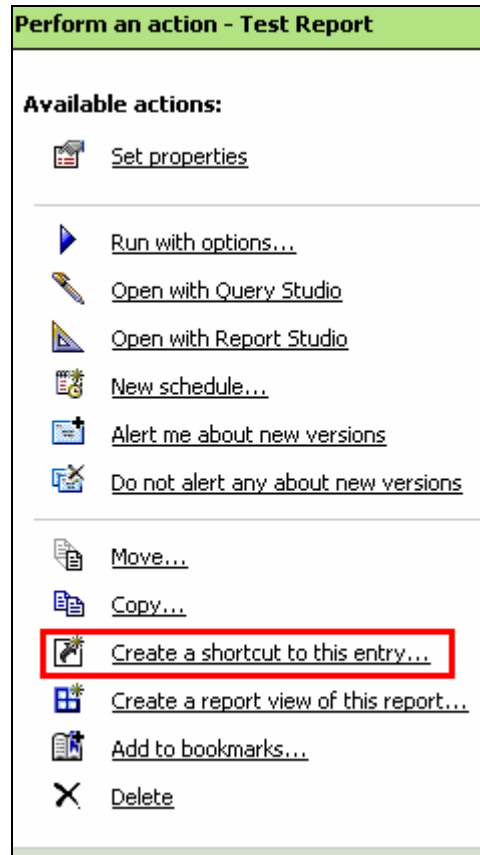


2. Click on Student Detail package.
3. Identify Test Report.

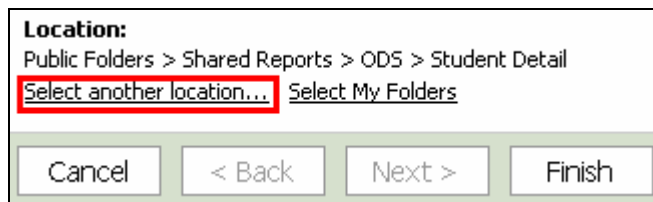
4. Click on the More link next to the report name.



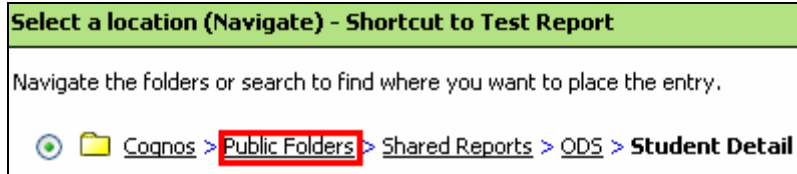
5. Click on Create a shortcut to this entry in the Available actions menu.



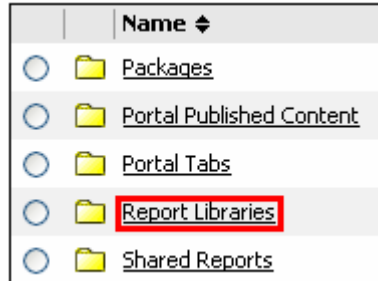
6. Under Location, click on Select another location.



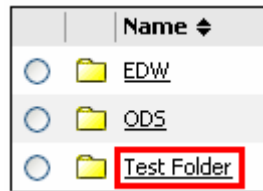
7. Click on Public Folders in the crumb trail.



8. Click on Report Libraries.



9. Click on the Test Report folder.



10. Click OK.

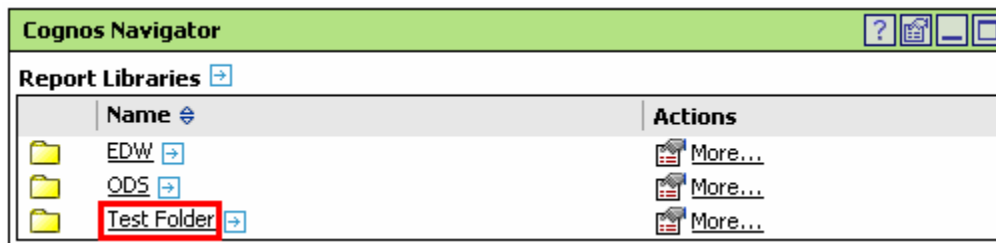
11. Click Finished.

12. Click on the tab to see changes.

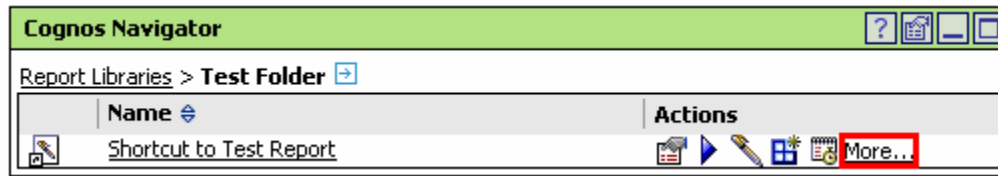
### 7.6 Deleting a Shortcut from a Tab

To delete a shortcut in the Cognos Navigator channel:

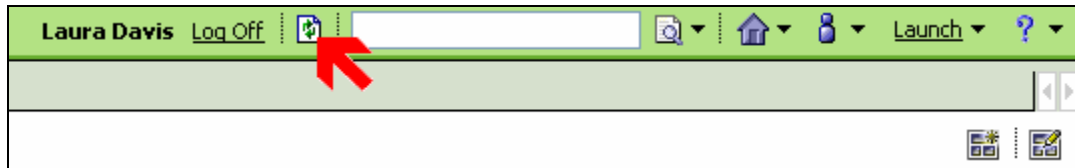
1. Under the Cognos Navigator channel, click on the Test Folder.



- Click on the More link to the right of the Shortcut to Test Report.



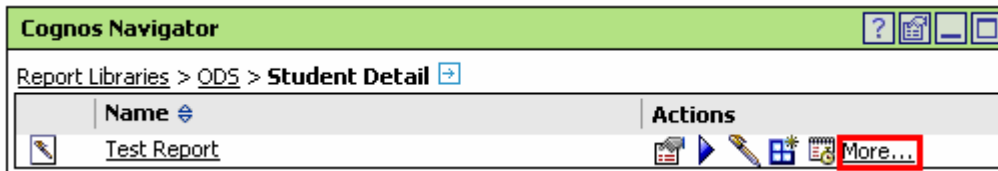
- Click Delete from the Available actions menu.
- Click OK.
- Click the Refresh icon on the top toolbar to see changes.



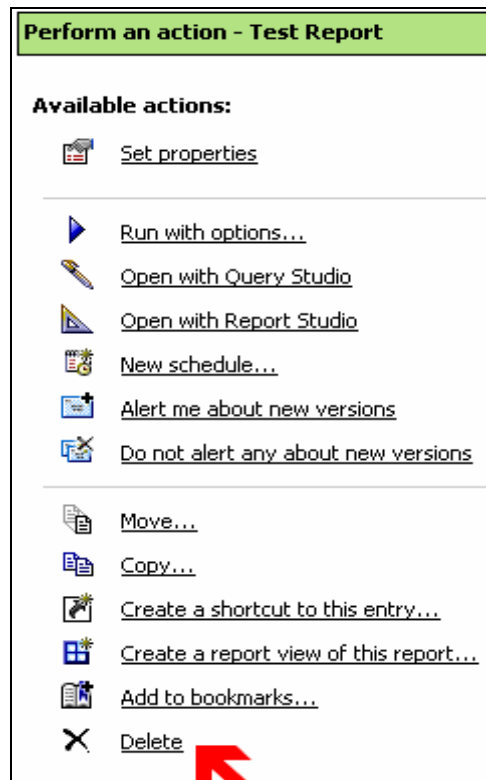
## 7.7 Deleting a Report from a Tab

To delete a report from a tab:

- Click the More link to the right of the report you wish to delete.



- The Available actions menu will appear. Click on Delete.

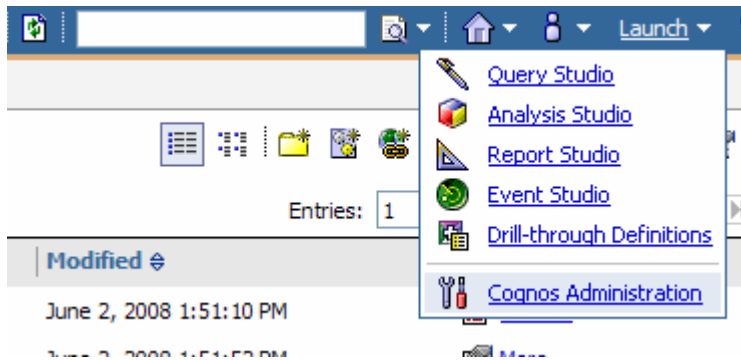


3. Click OK.

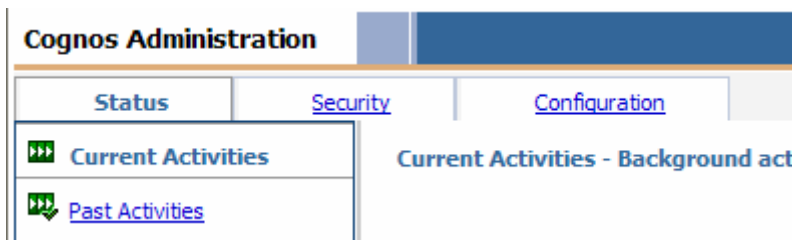
## Setup User Account for the Portal

### Step-by-Step setup for a Report Viewer account

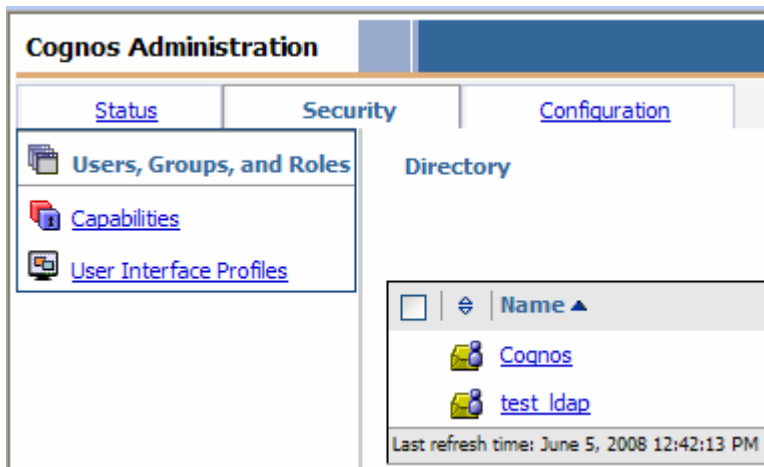
1. Go to Launch and click Cognos Administration



2. Click Security tab

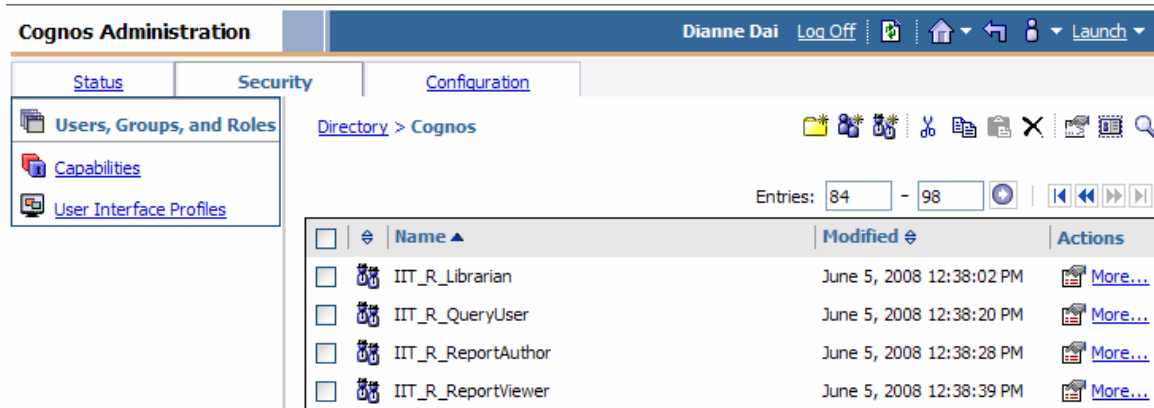


3. In the Directory window click Cognos namespace

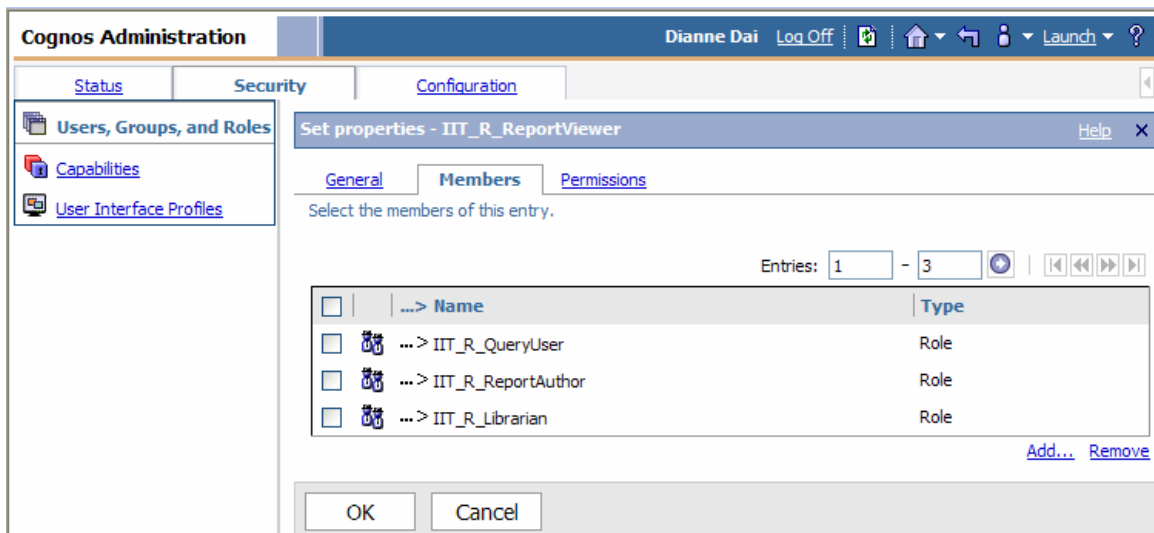




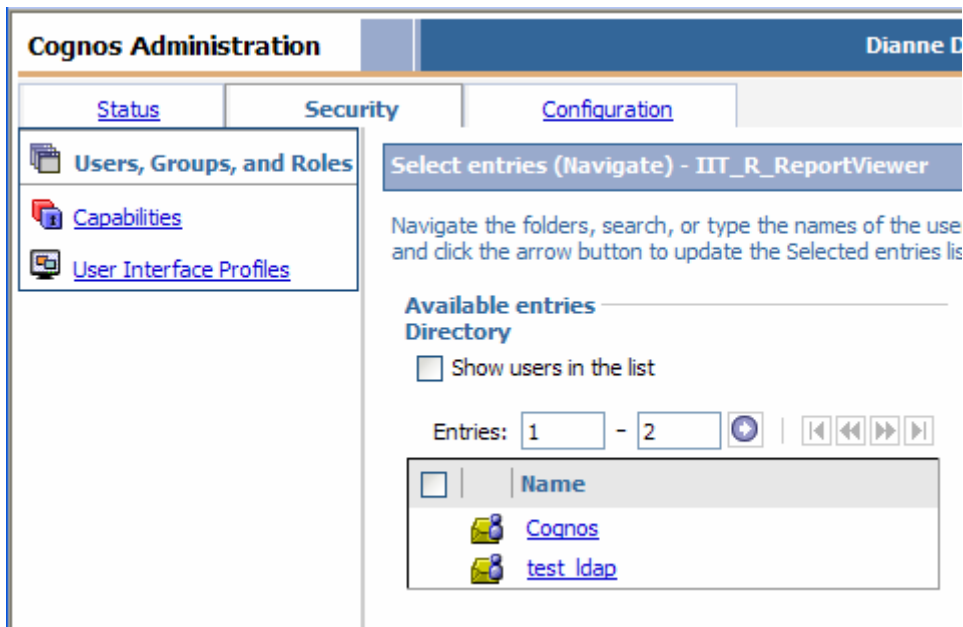
- Navigate in the Cognos namespace to the IIT\_R\_ReportViewer role and click properties icon



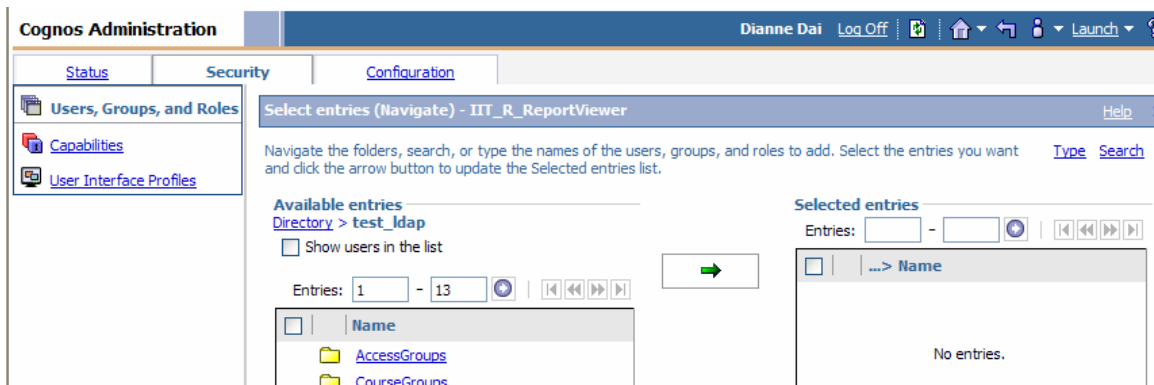
- Click Members tab then click Add...



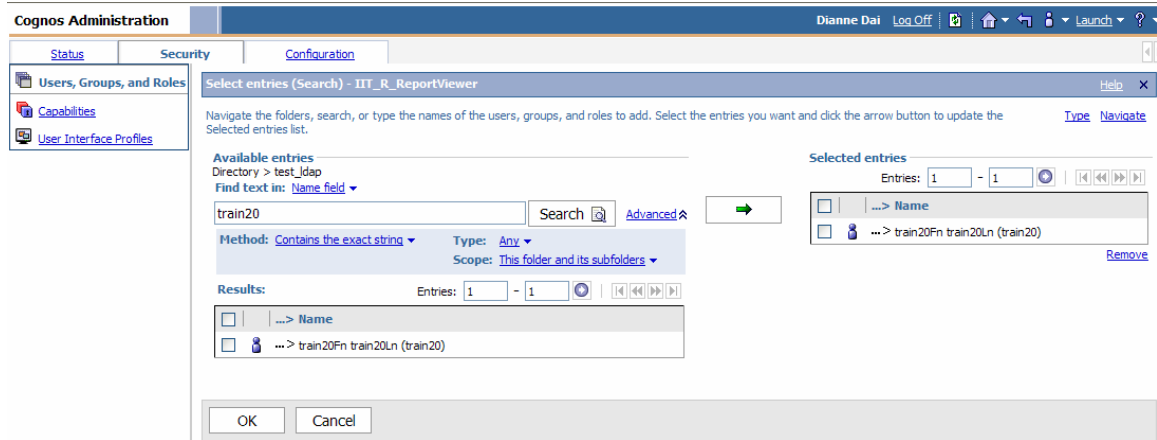
- Click on LDAP namespace (this example is taken from Test and the namespace is called test\_ldap) that contains the desired user account



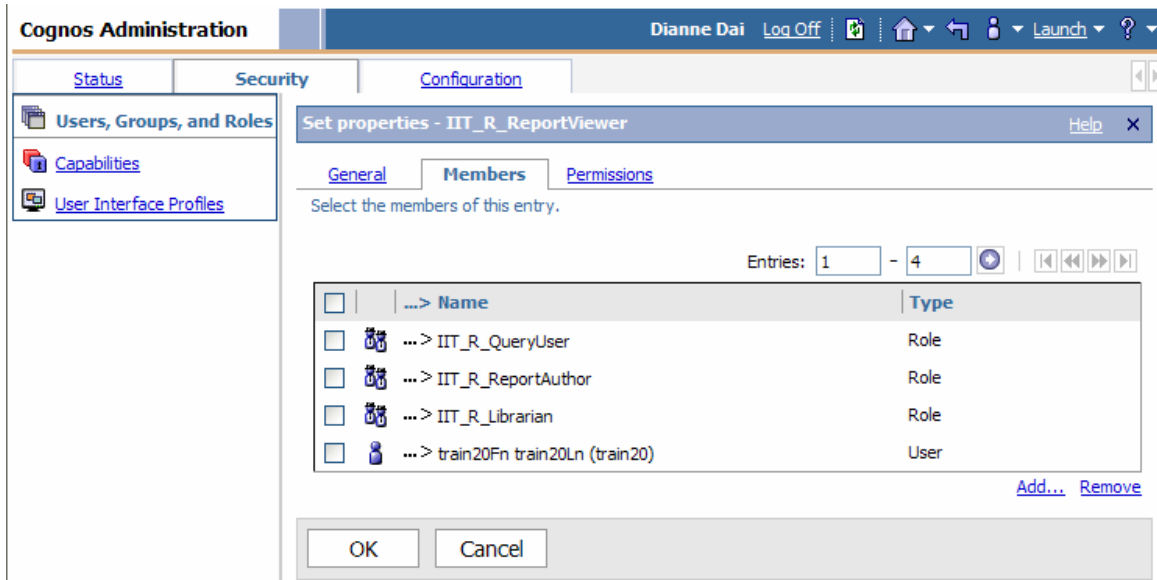
- Click Search



- Use Search to locate the user account in the LDAP. Check the box next to the user account then click the green arrow to add the account to the right window. Click OK.



- The user is now a member of the IIT\_R\_ReportViewer role. Click OK.



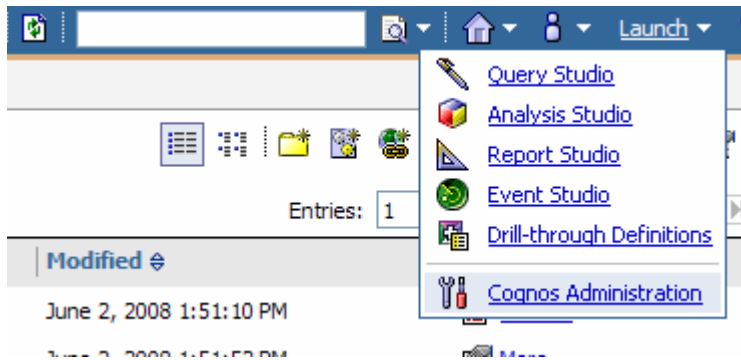
- Repeat steps 4 through 9 adding the same user account as a member of the desired package group(s). The package groups all start with IIT\_P\_ and then the name the package the group has access to. For example the group called IIT\_P\_Active Registration has access to the Active Registration package. All of the package groups are located in the Cognos namespace.

**IMPORTANT NOTE:** Do not add the user to the package groups that end in \_L. For example the group IIT\_P\_Active Registration\_L is a special group that only Report Librarians are members of. These groups have write permission to the Report Libraries folder structure.

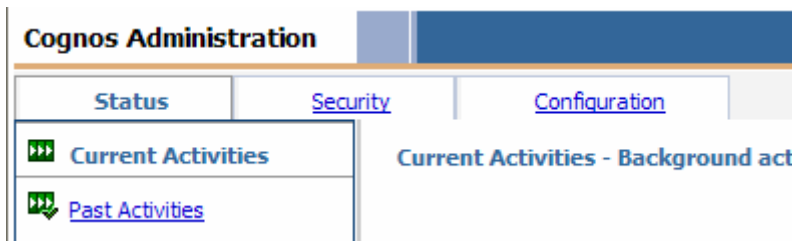
11. This completes the required steps to create a user with the Report Viewer role for the Cognos application.

## Steps to Add Portal Tabs to User Account

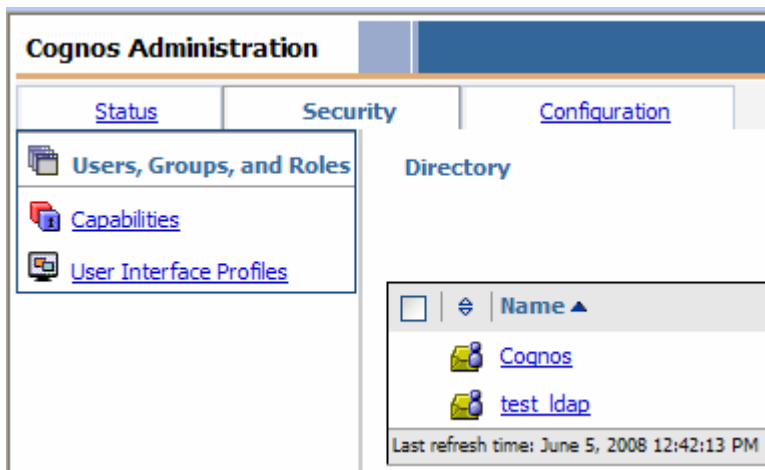
1. Go to Launch and click Cognos Administration



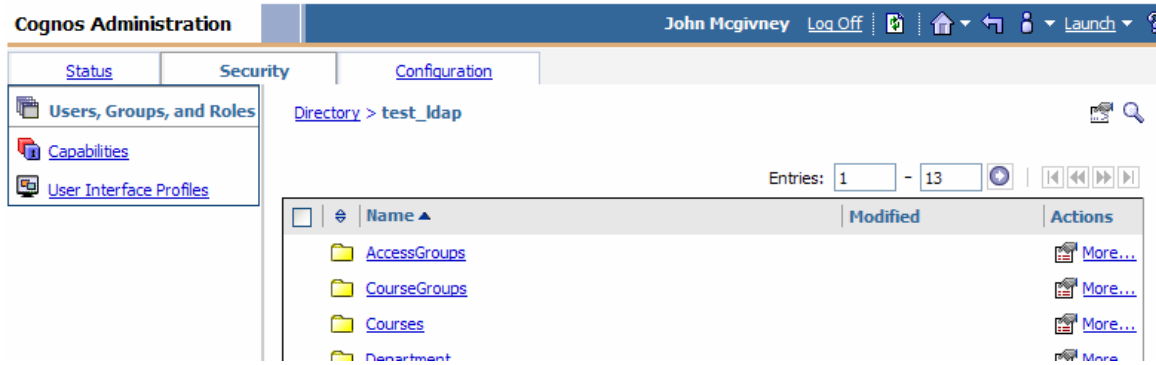
2. Click Security tab



3. In the Directory window click test\_Idap namespace (this example is taken from Test and the namespace is called test\_Idap) that contains the desired user account



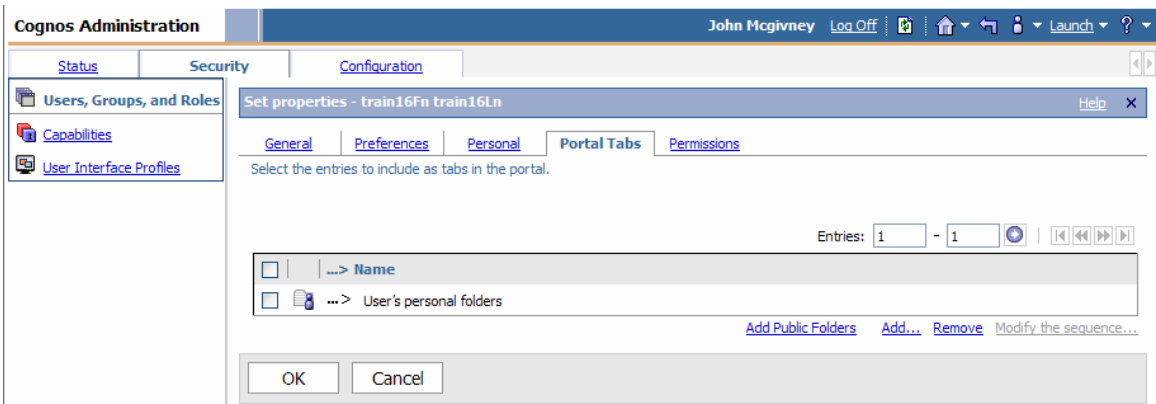
4. Click on the search icon



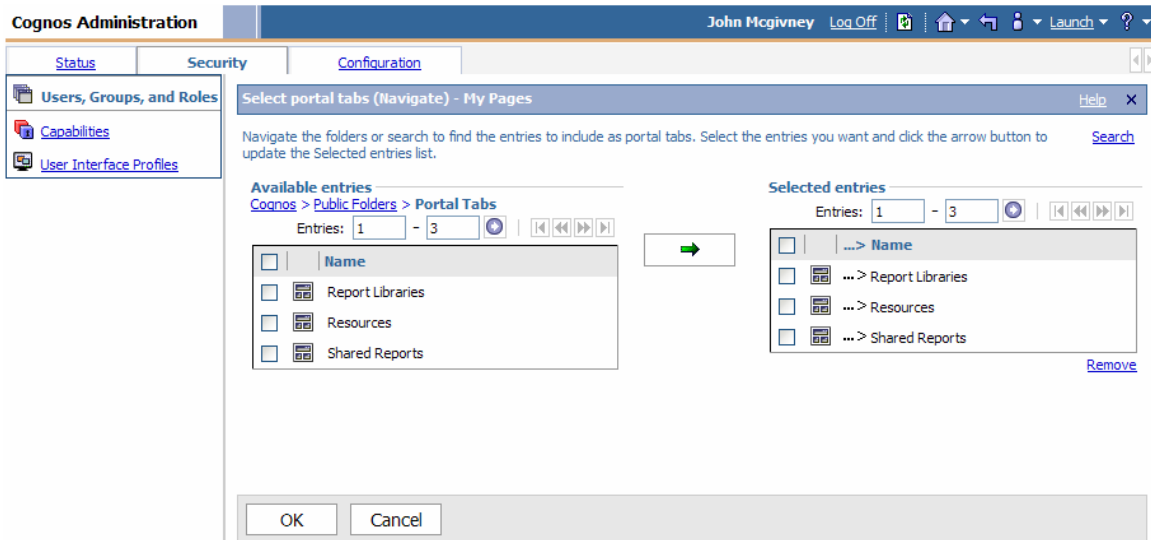
5. Use search to locate the user that the portal tabs will be added to. Click the properties icon.



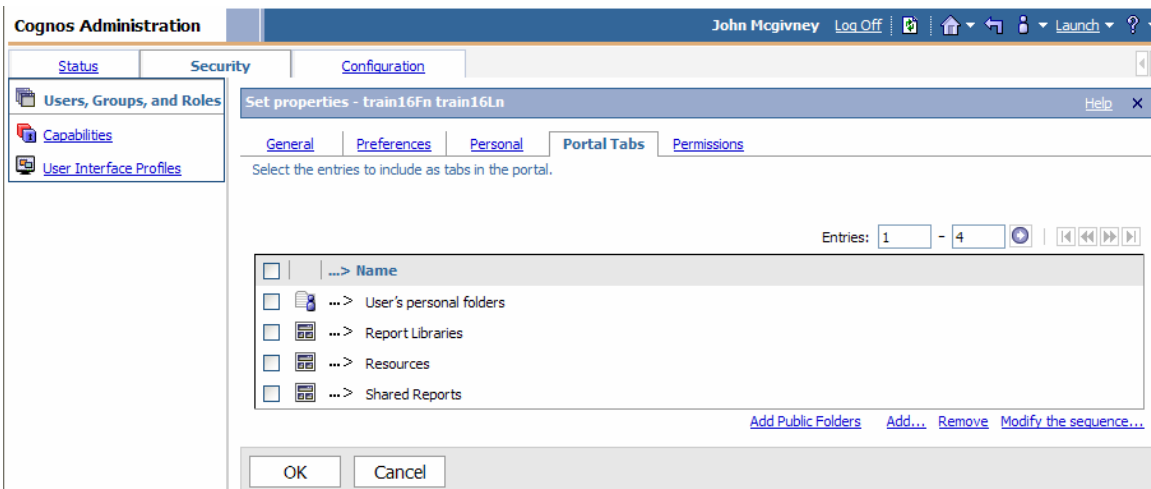
6. Click the Portal Tabs tab and click Add...



7. Browser into the Portal Tabs folder, place a check next to each tab on the left pane, click the green arrow to move the tabs to the right pane and click OK.



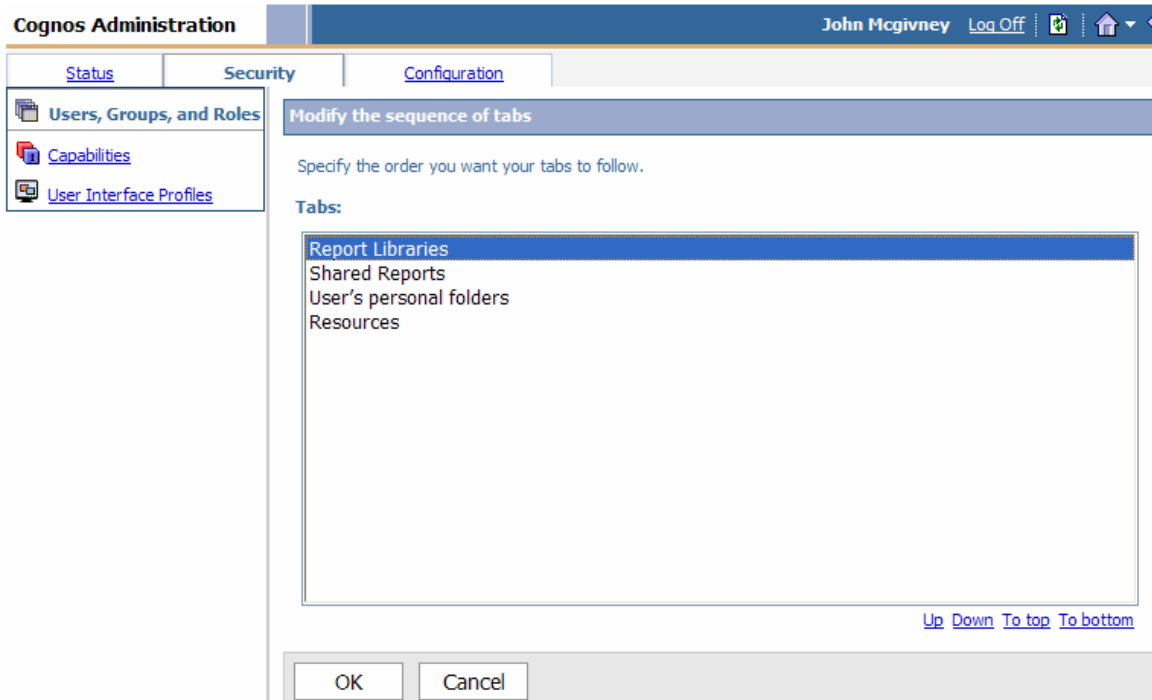
8. Click Modify the sequence...



9. Use the UP and Down buttons to order the tabs as follows:

- Report Libraries
- Shared Reports
- User's personal folders
- Resources

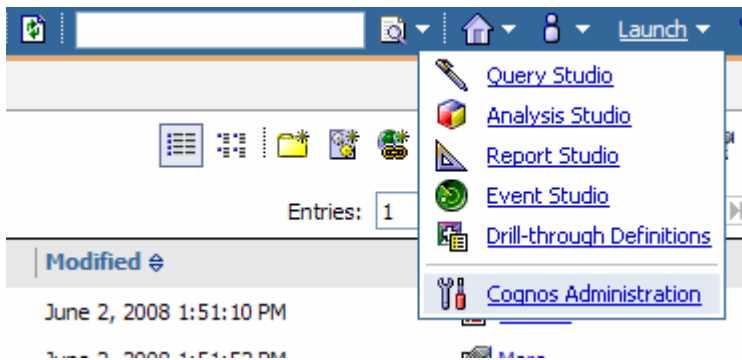
Click OK and click OK on the next screen.



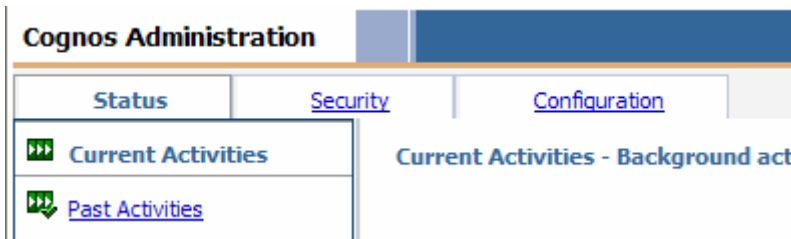
10. The tab setup for the user account is complete.

## Step-by-Step setup for a Query User

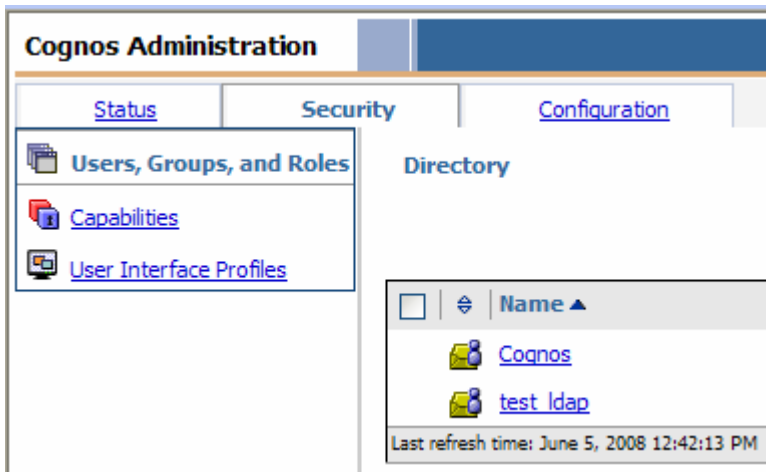
1. Go to Launch and click Cognos Administration



2. Click Security tab

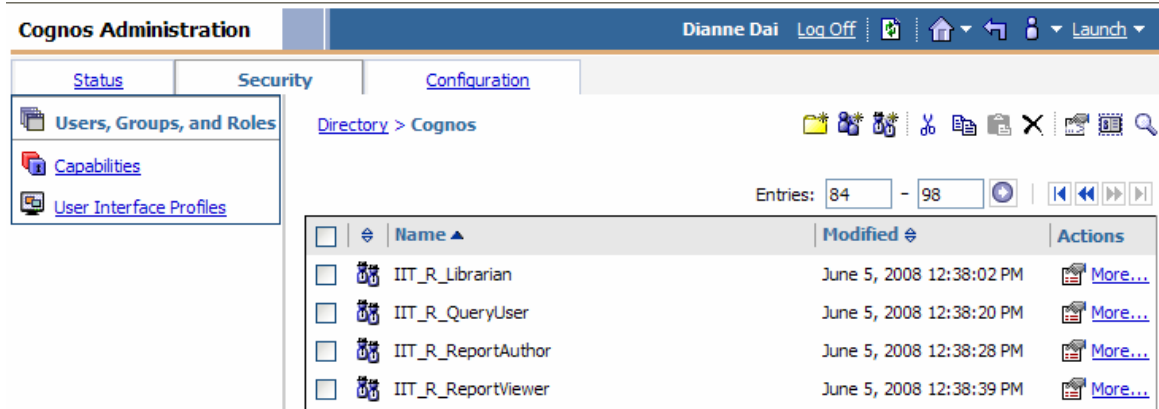


3. In the Directory window click Cognos namespace

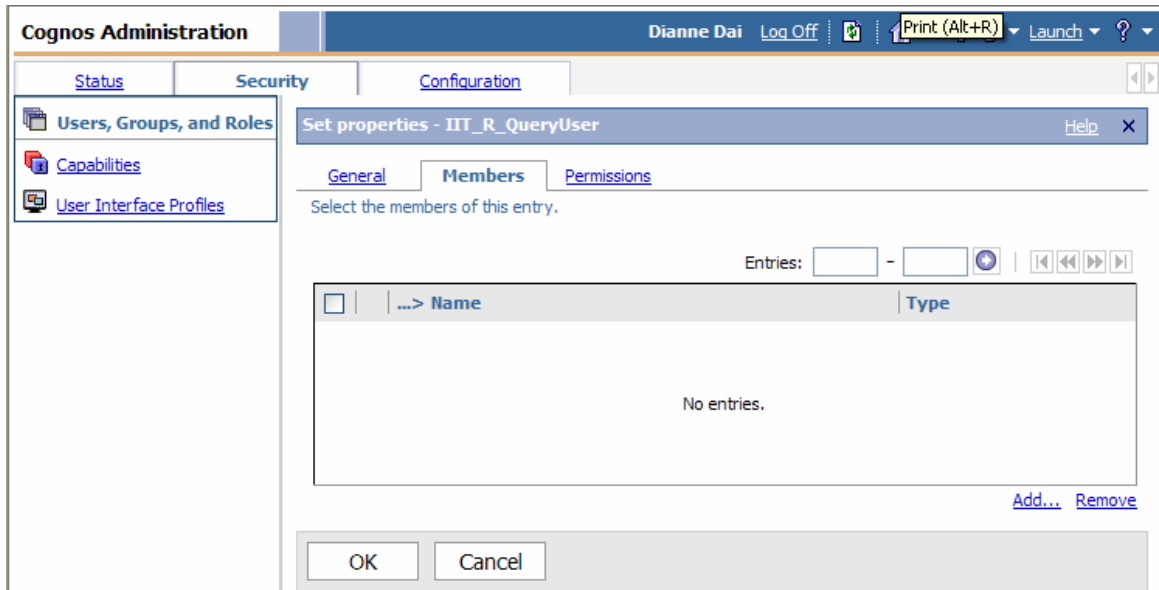




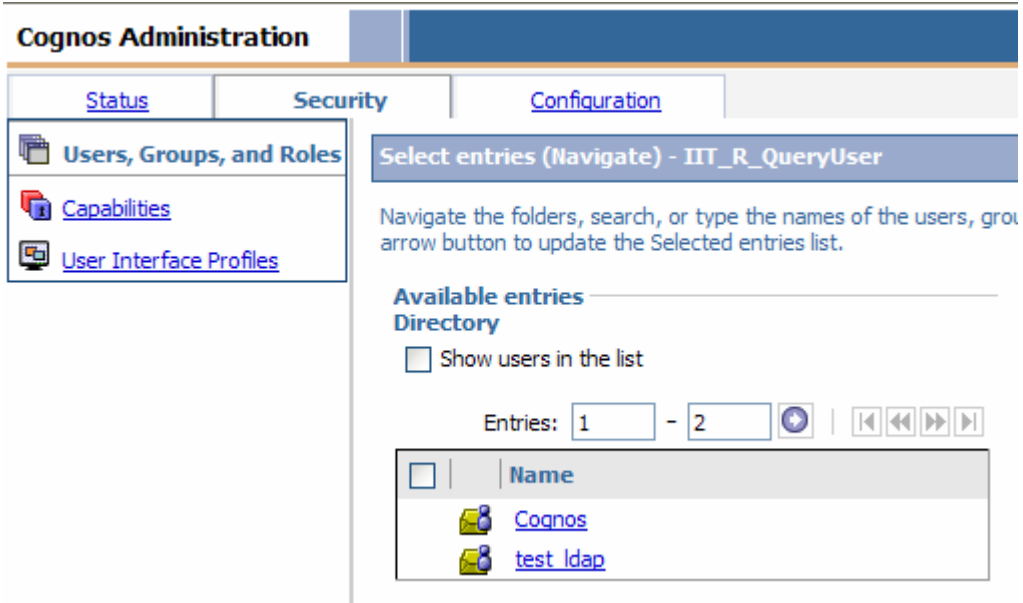
4. Navigate in the Cognos namespace to the IIT\_R\_QueryUser role and click properties icon



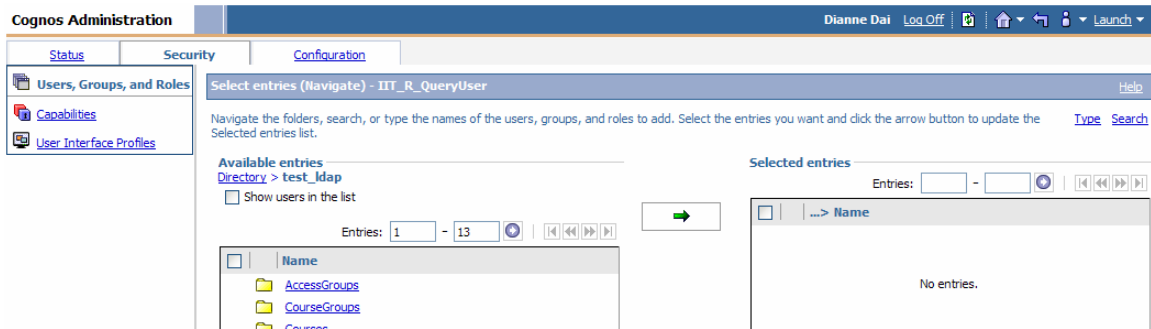
5. Click Members tab then click Add...



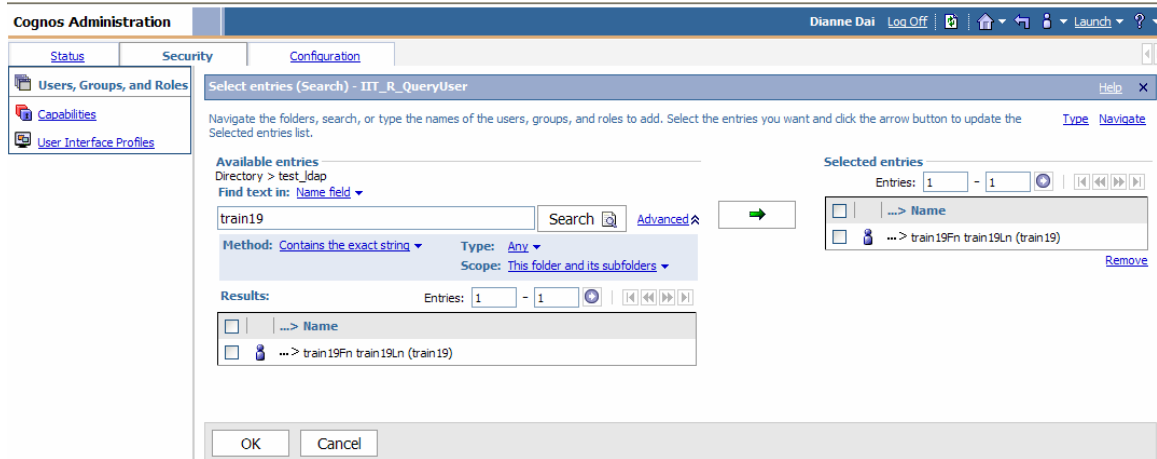
6. Click on LDAP namespace (this example is taken from Test and the namespace is called test\_ldap) that contains the desired user account



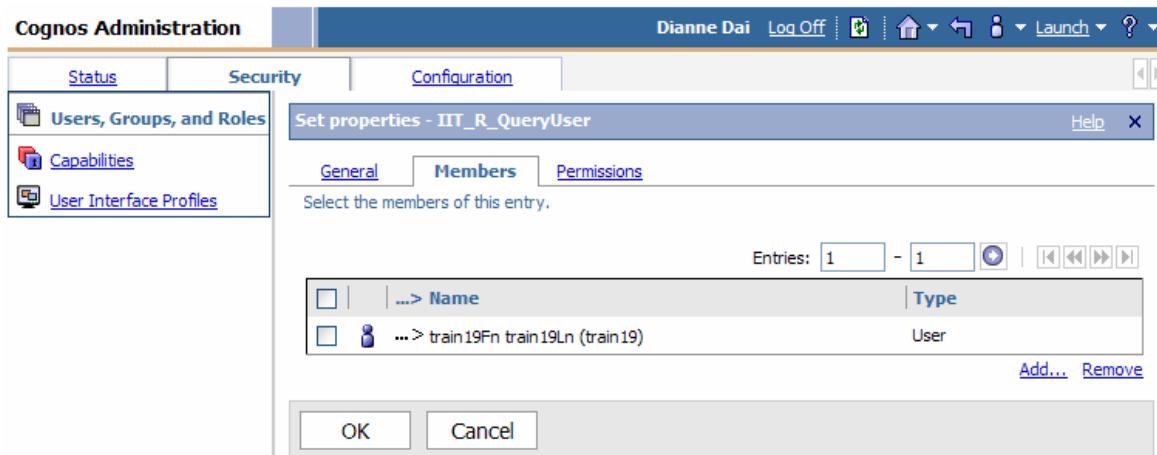
7. Click Search



- Use Search to locate the user account in the LDAP. Check the box next to the user account then click the green arrow to add the account to the right window. Click OK.



- The user is now a member of the IIT\_R\_QueryUser role. Click OK.



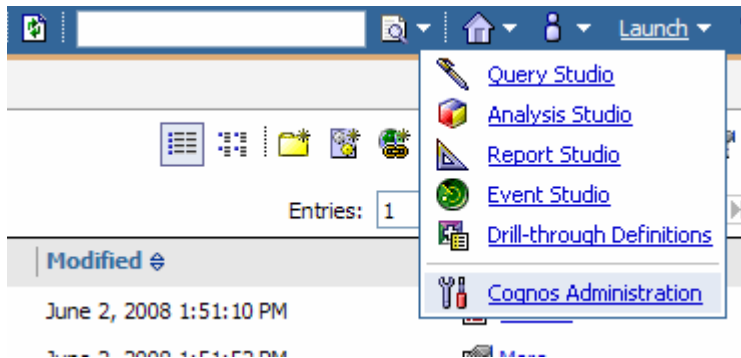
- Repeat steps 4 through 9 adding the same user account as a member of the desired package group(s). The package groups all start with IIT\_P\_ and then the name the package the group has access to. For example the group called IIT\_P\_Active Registration has access to the Active Registration package. All of the package groups are located in the Cognos namespace.

**IMPORTANT NOTE:** Do not add the user to the package groups that end in \_L. For example the group IIT\_P\_Active Registration\_L is a special group that only Report Librarians are members of. These groups have write permission to the Report Libraries folder structure.

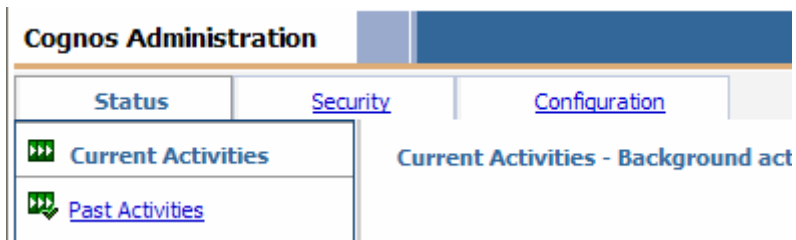
- This completes the required steps to create a user with the Query User role for the Cognos application.

## Steps to Add Portal Tabs to User Account

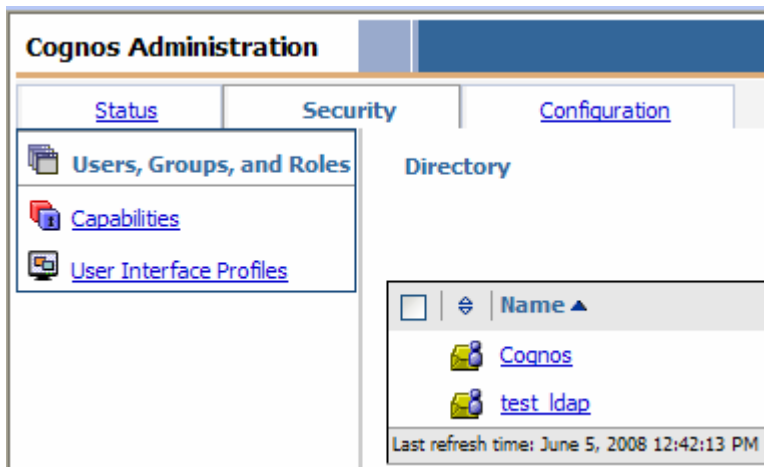
1. Go to Launch and click Cognos Administration



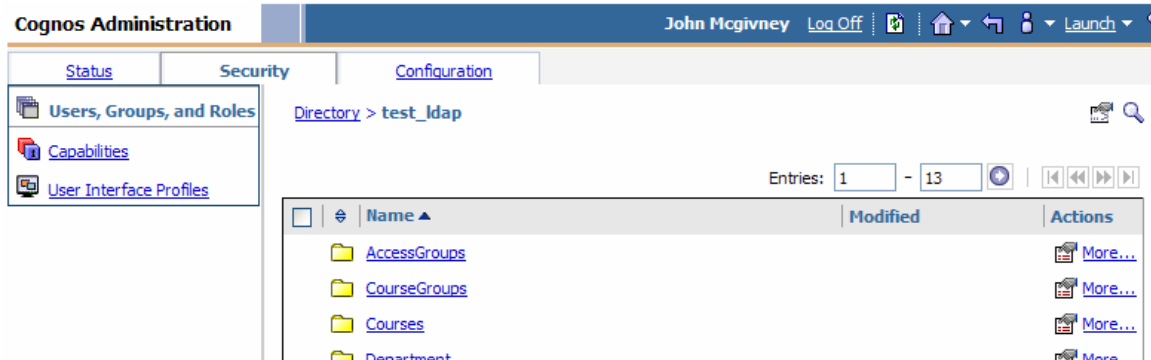
2. Click Security tab



3. In the Directory window click test\_ldap namespace (this example is taken from Test and the namespace is called test\_ldap) that contains the desired user account



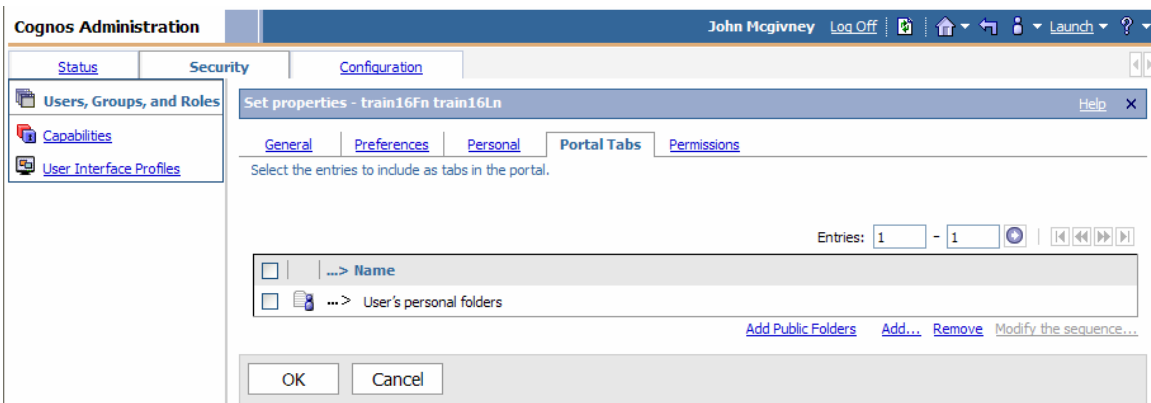
- Click on the search icon



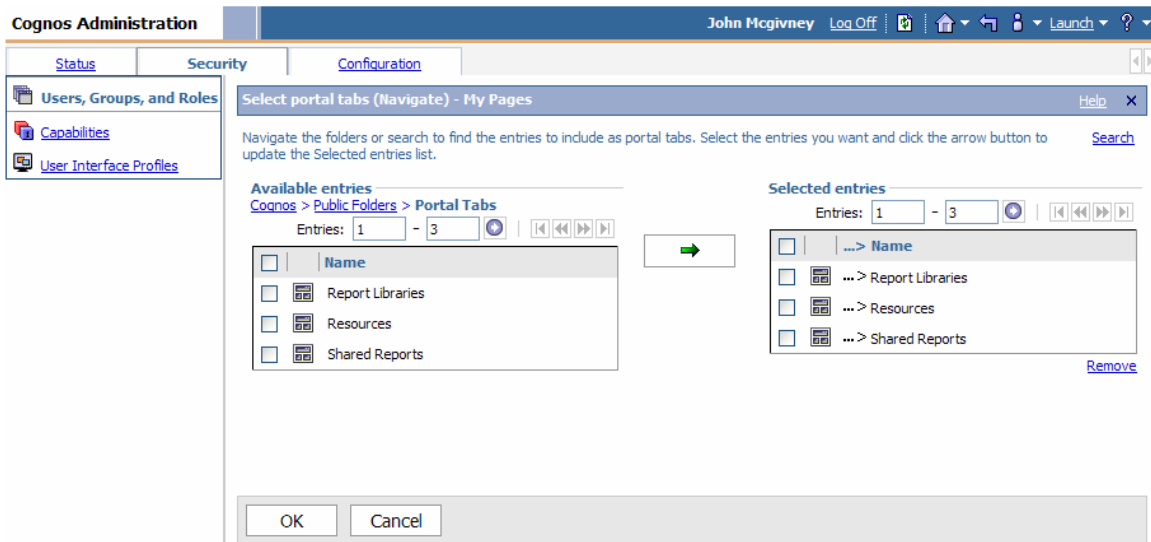
- Use search to locate the user that the portal tabs will be added to. Click the properties icon.



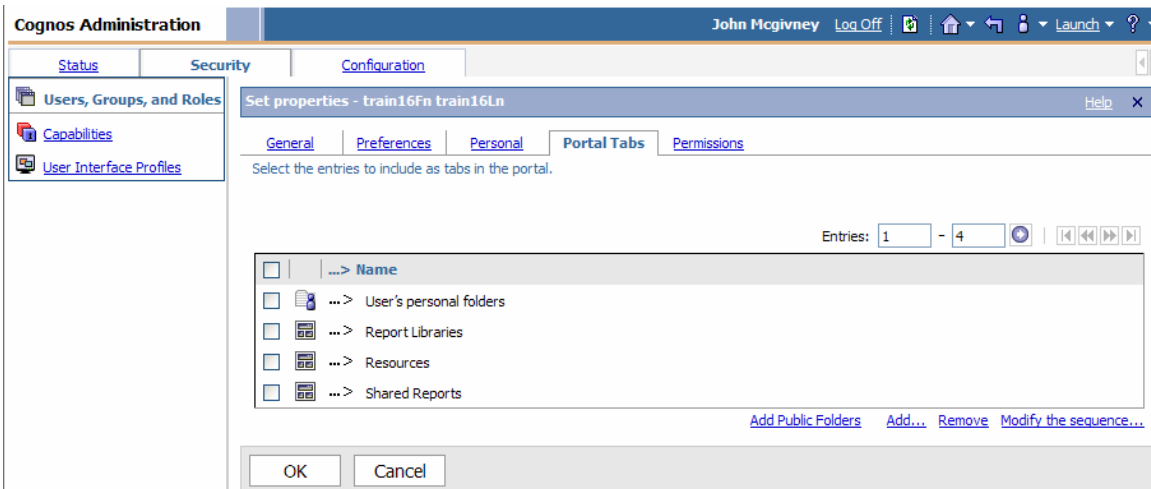
- Click the Portal Tabs tab and click Add...



- Browse into the Portal Tabs folder, place a check next to each tab on the left pane, click the green arrow to move the tabs to the right pane and click OK.



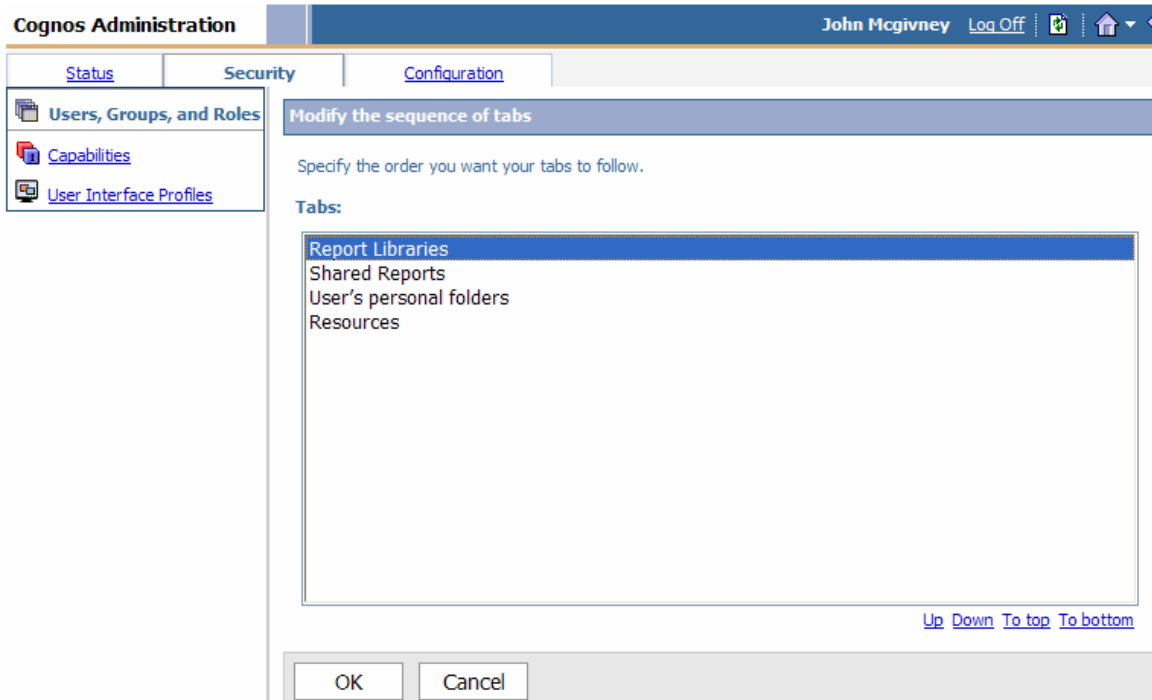
8. Click Modify the sequence...



9. Use the UP and Down buttons to order the tabs as follows:

- Report Libraries
- Shared Reports
- User's personal folders
- Resources

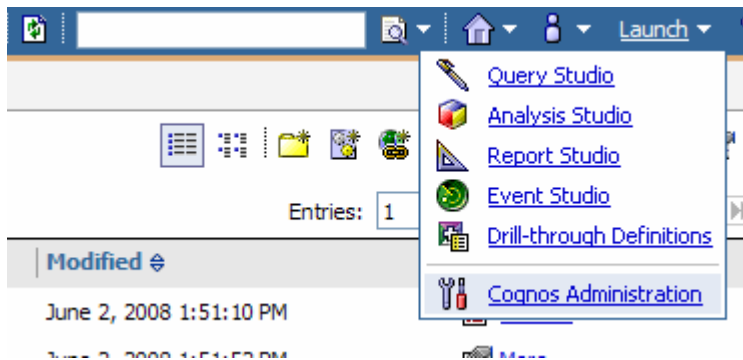
Click OK and click OK on the next screen.



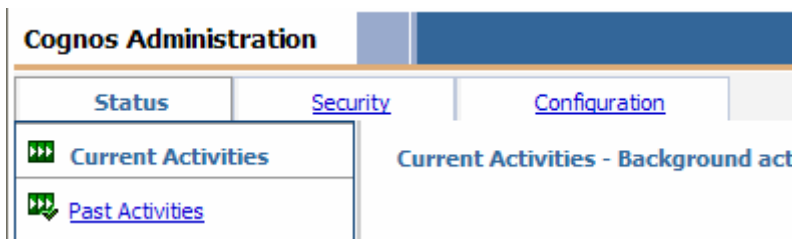
10. The tab setup for the user account is complete.

## Step-by-Step setup for a Report Author

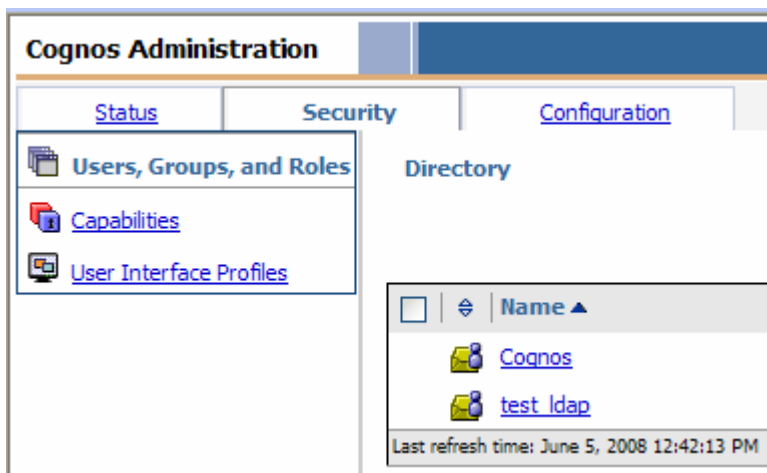
1. Go to Launch and click Cognos Administration



2. Click Security tab

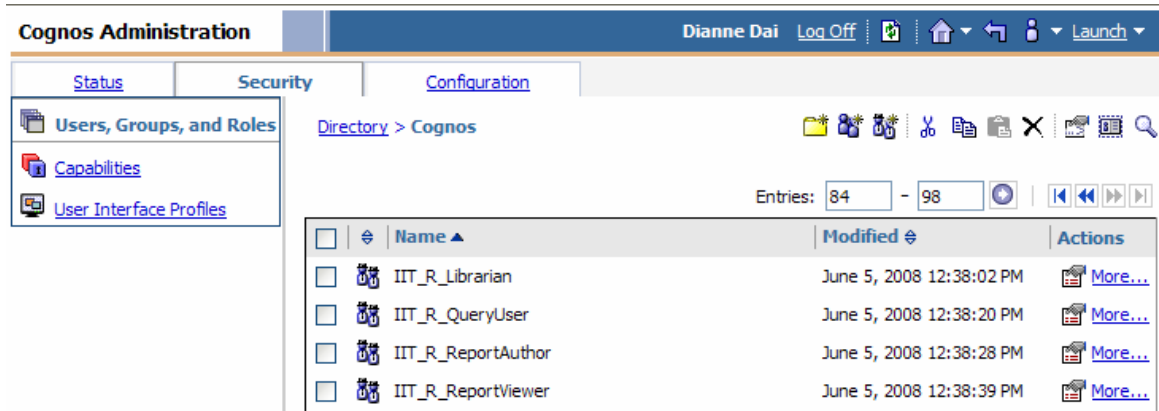


3. In the Directory window click Cognos namespace

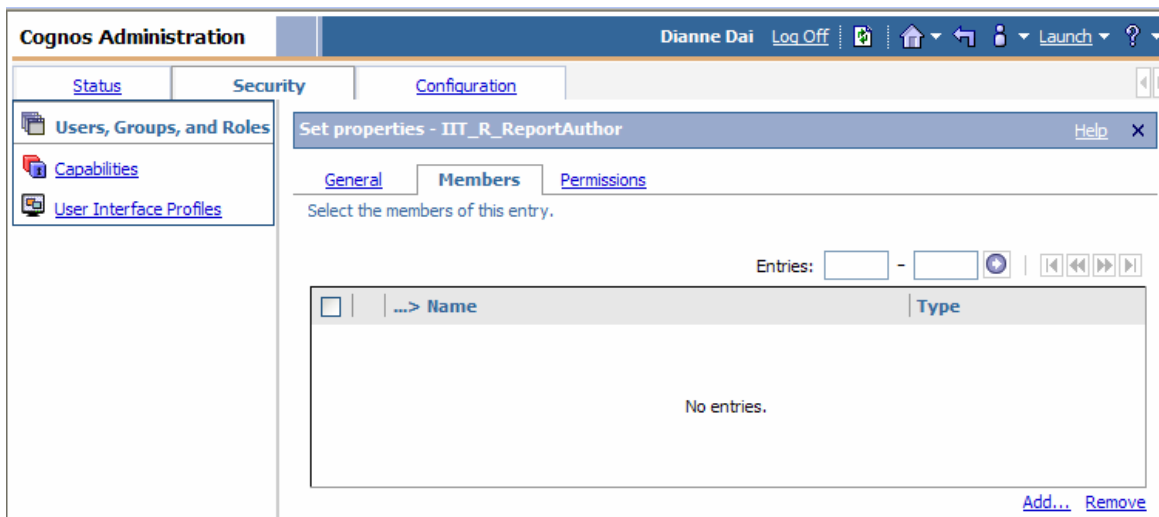




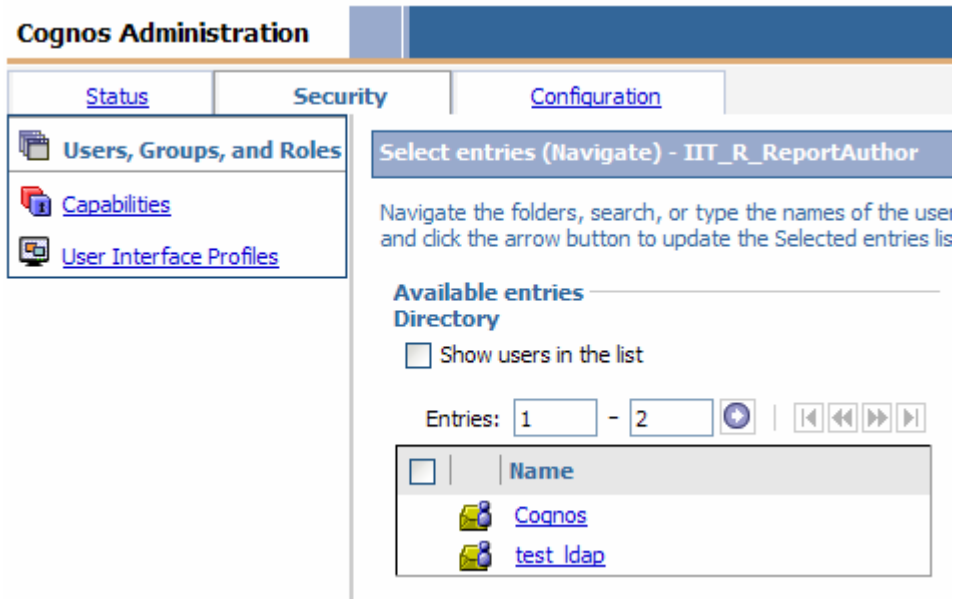
4. Navigate in the Cognos namespace to the IIT\_R\_ReportAuthor role and click properties icon



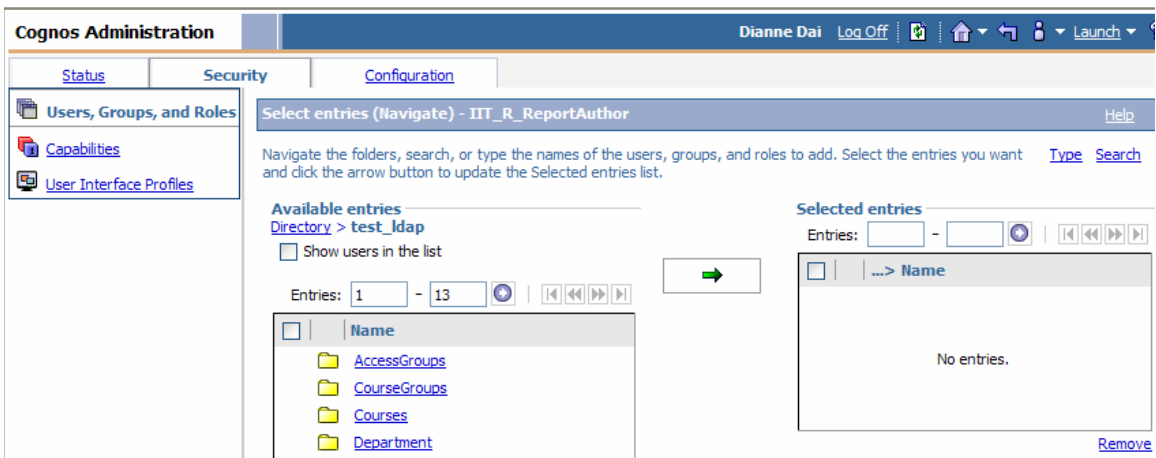
5. Click Members tab then click Add...



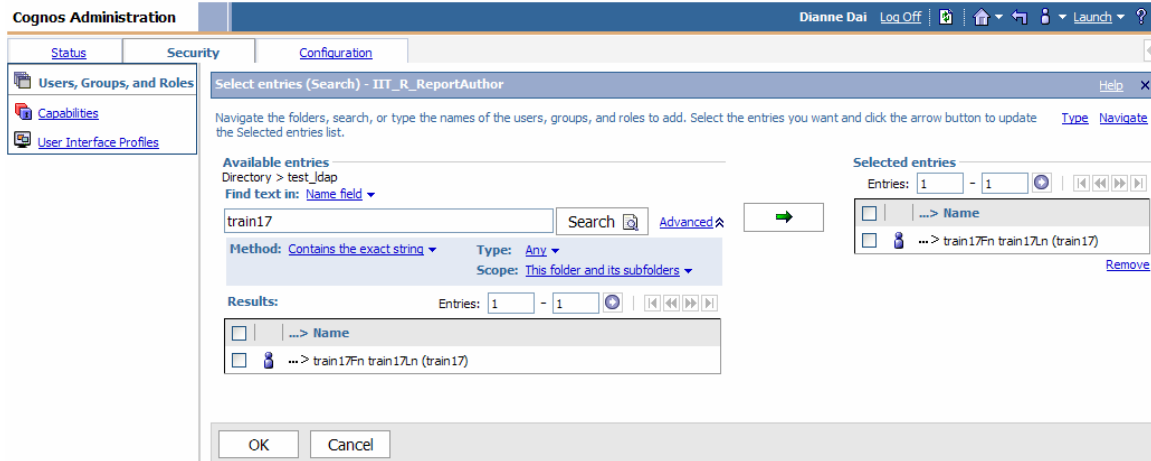
6. Click on LDAP namespace (this example is taken from Test and the namespace is called test\_ldap) that contains the desired user account



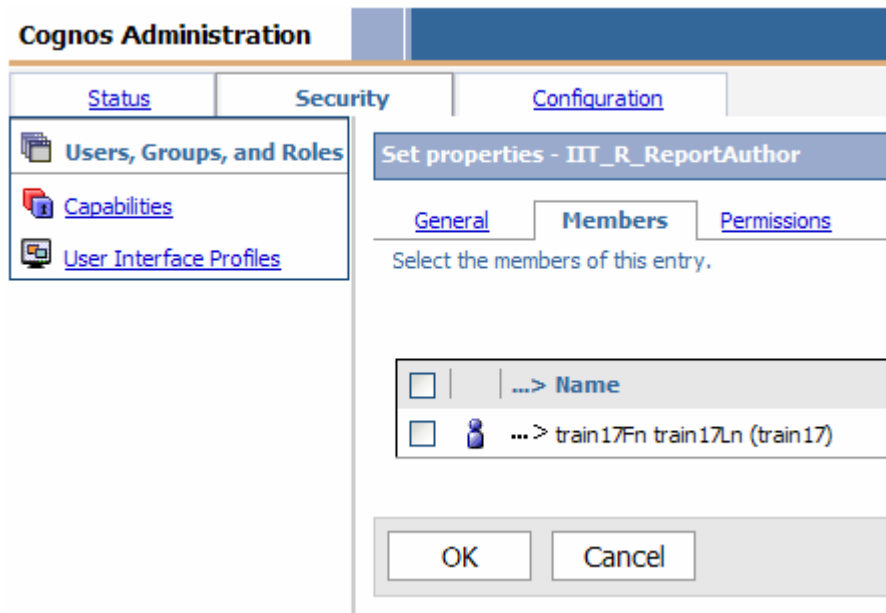
7. Click Search



- Use Search to locate the user account in the LDAP. Check the box next to the user account then click the green arrow to add the account to the right window. Click OK.



- The user is now a member of the IIT\_R\_ReportAuthor role. Click OK.



- Repeat steps 4 through 9 adding the same user account as a member of the desired package group(s). The package groups all start with IIT\_P\_ and then the name the package the group has access to. For example the group called IIT\_P\_Active Registration has access to the Active Registration package. All of the package groups are located in the Cognos namespace.

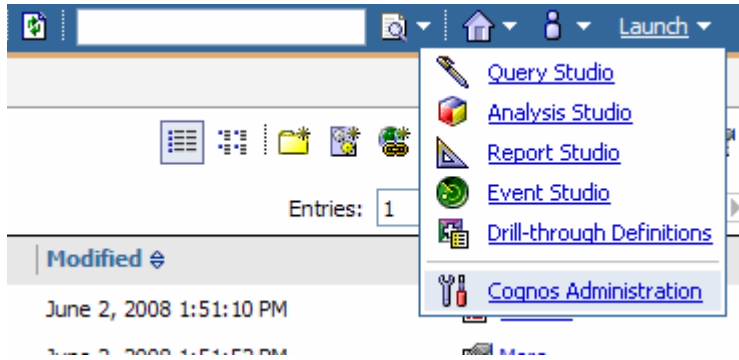
**IMPORTANT NOTE:** Do not add the user to the package groups that end in \_L. For example the group IIT\_P\_Active Registration\_L is a special group that only Report

Librarians are members of. These groups have write permission to the Report Libraries folder structure.

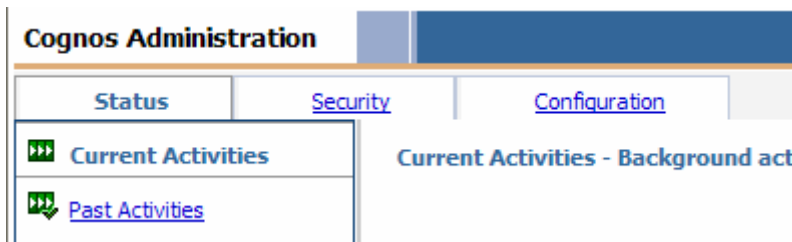
11. This completes the required steps to create a user with the Report Author role for the Cognos application.

### Steps to Add Portal Tabs to User Account

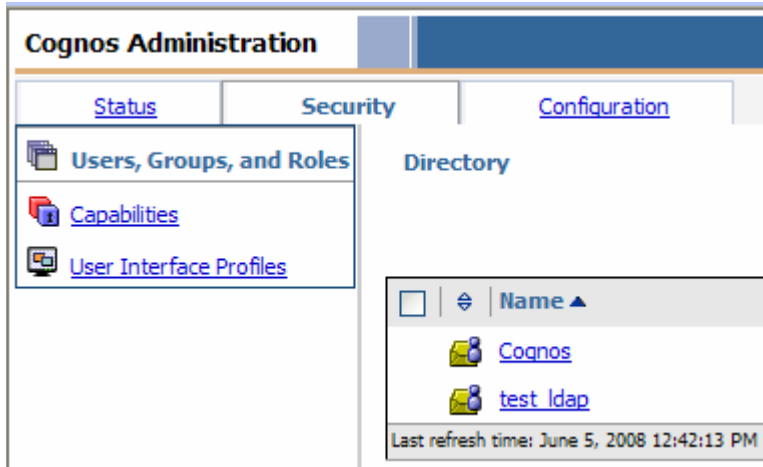
1. Go to Launch and click Cognos Administration



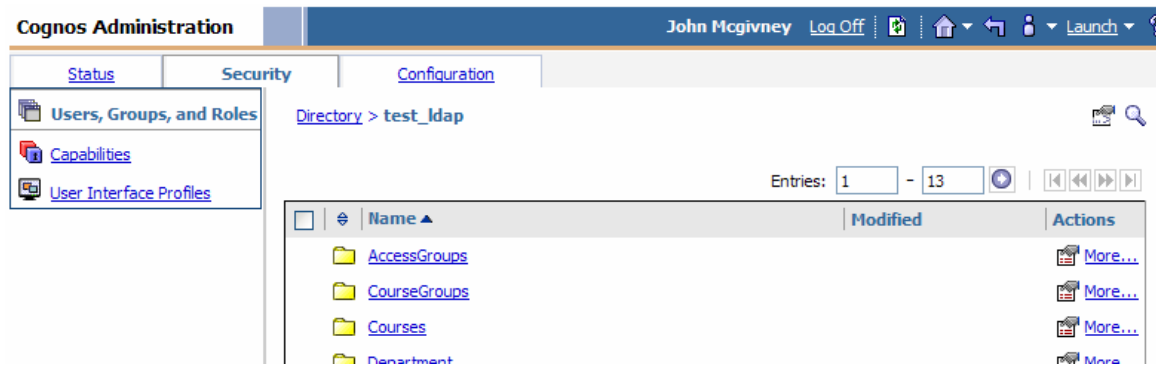
2. Click Security tab



3. In the Directory window click test\_ldap namespace (this example is taken from Test and the namespace is called test\_ldap) that contains the desired user account



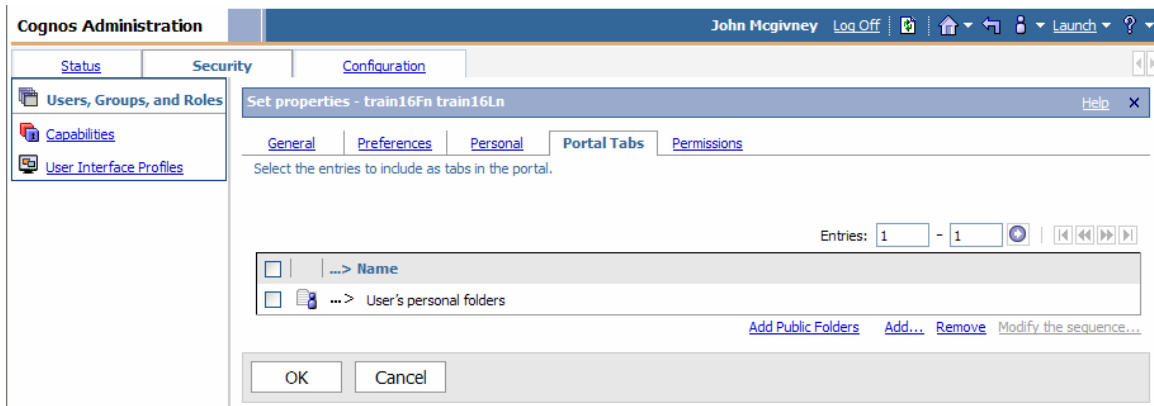
4. Click on the search icon



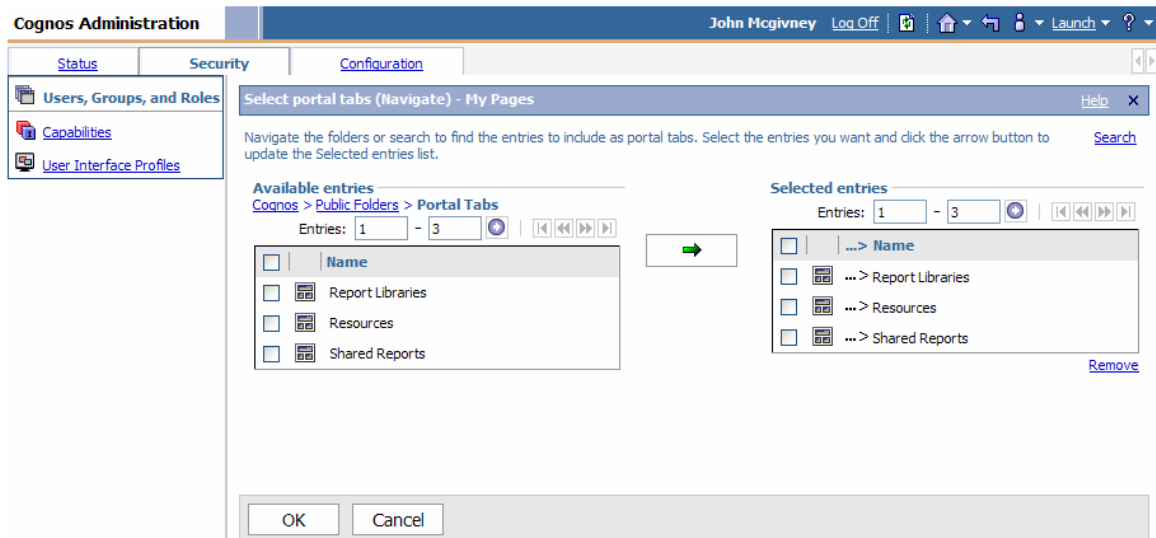
5. Use search to locate the user that the portal tabs will be added to. Click the properties icon.



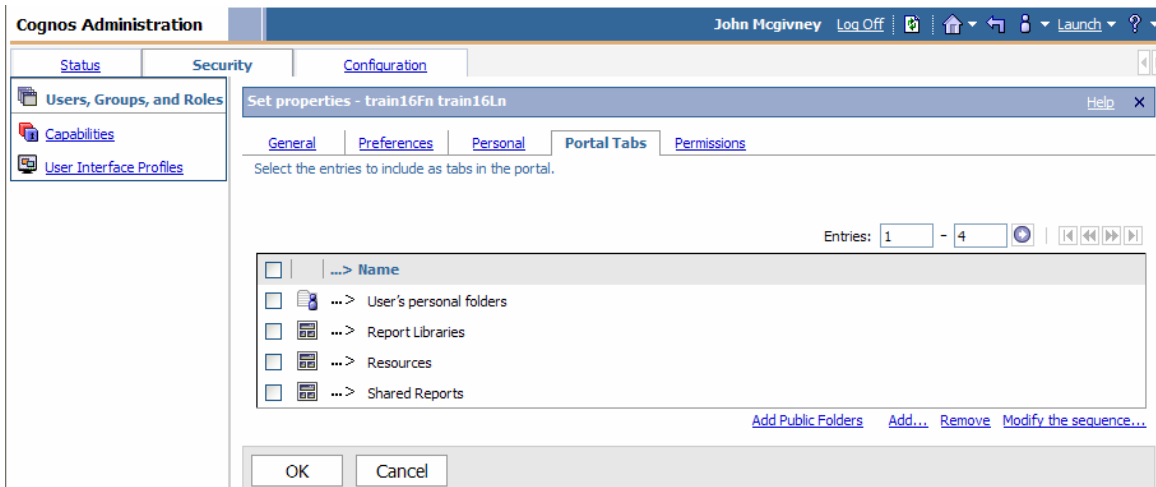
6. Click the Portal Tabs tab and click Add...



7. Browse into the Portal Tabs folder, place a check next to each tab on the left pane, click the green arrow to move the tabs to the right pane and click OK.



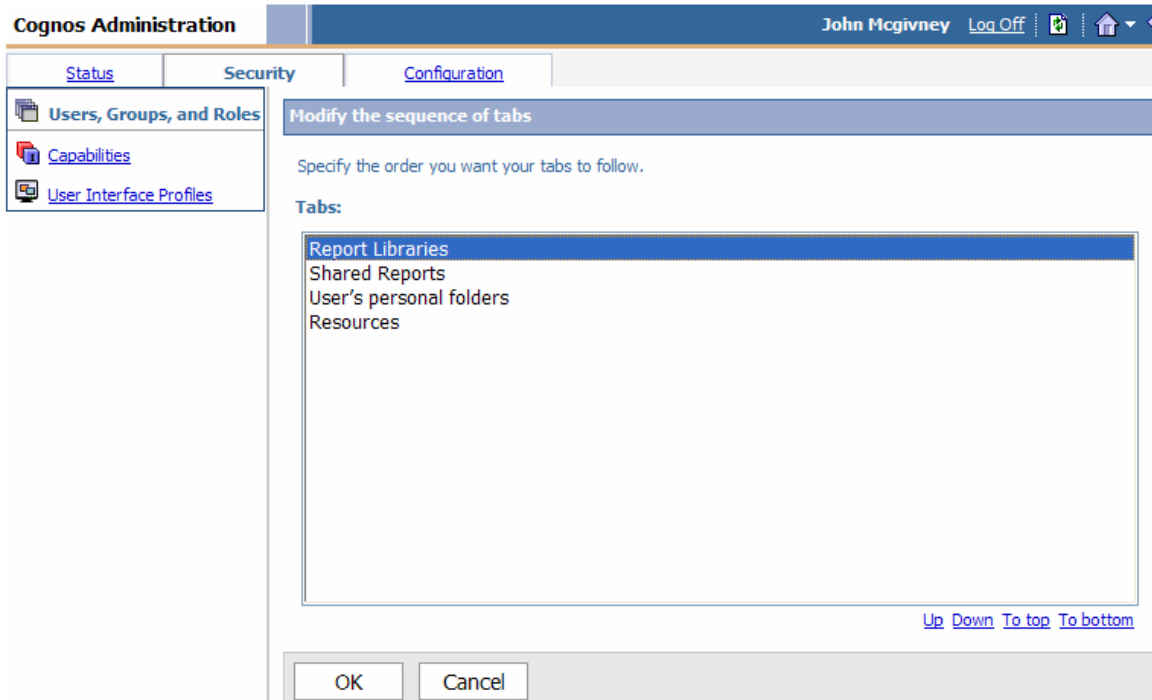
8. Click Modify the sequence...



9. Use the UP and Down buttons to order the tabs as follows:

- Report Libraries
- Shared Reports
- User's personal folders
- Resources

Click OK and click OK on the next screen.

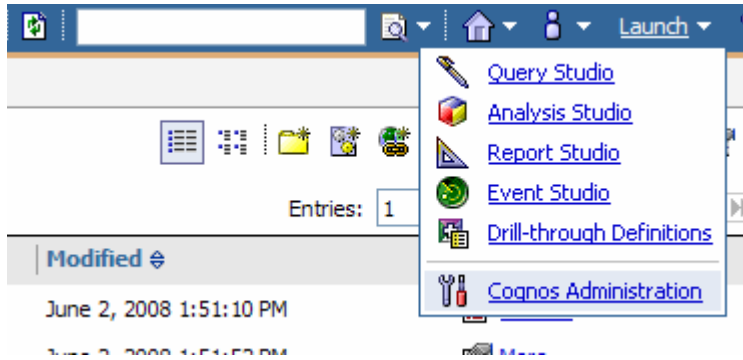


10. The tab setup for the user account is complete.

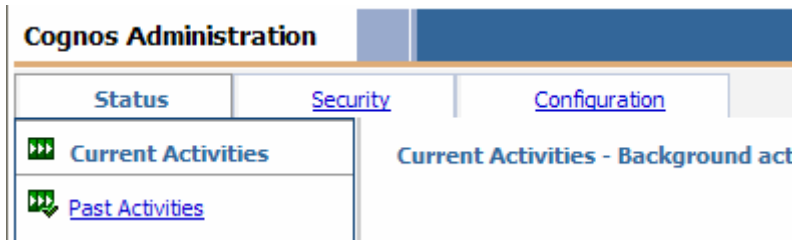


### Step-by-Step setup for a Report Librarian

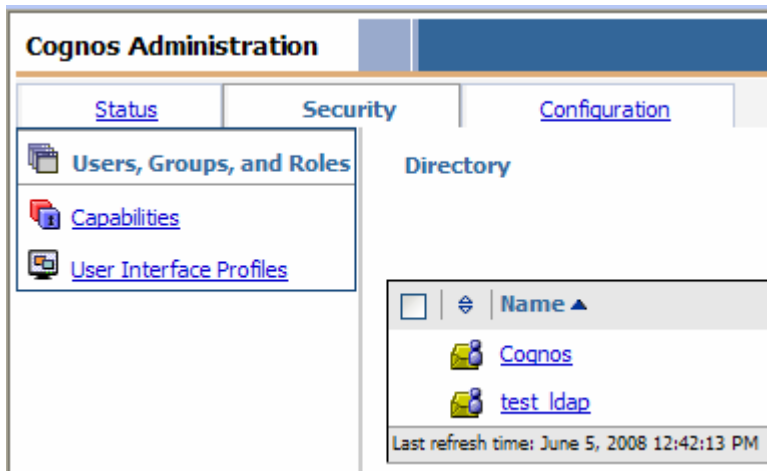
1. Go to Launch and click Cognos Administration



2. Click Security tab



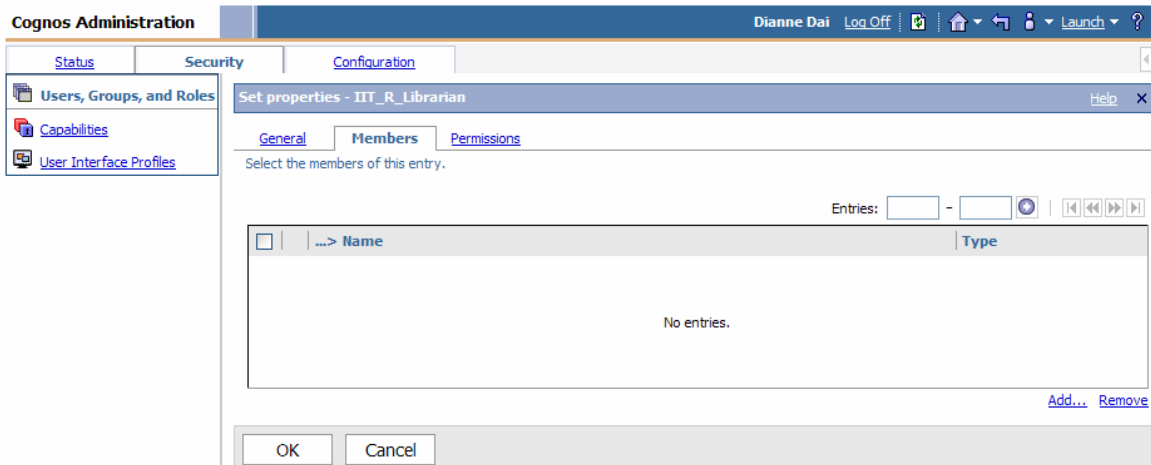
3. In the Directory window click Cognos namespace



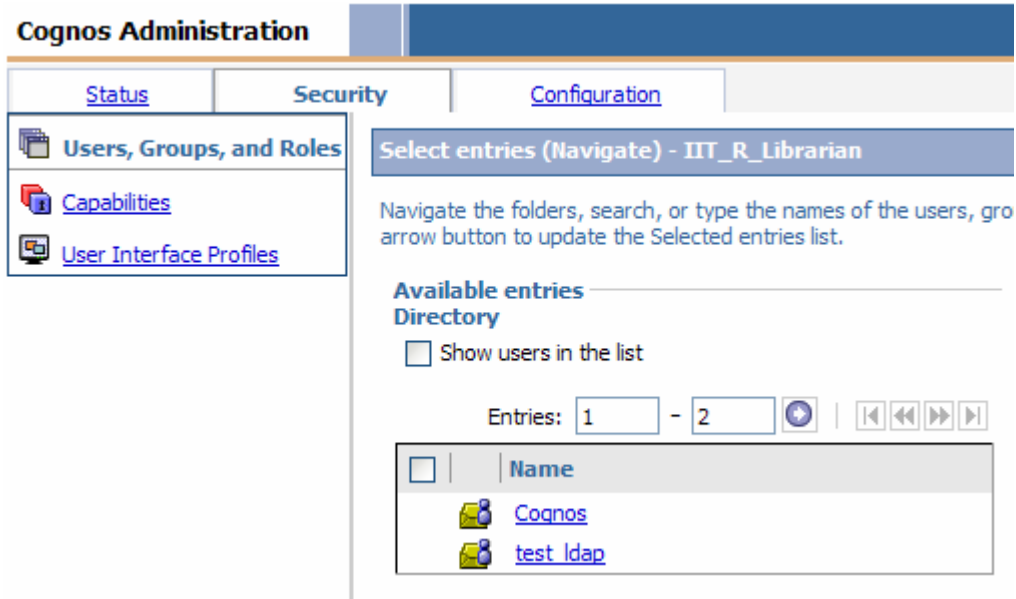
4. Navigate in the Cognos namespace to the IIT\_R\_Librarian role and click properties icon



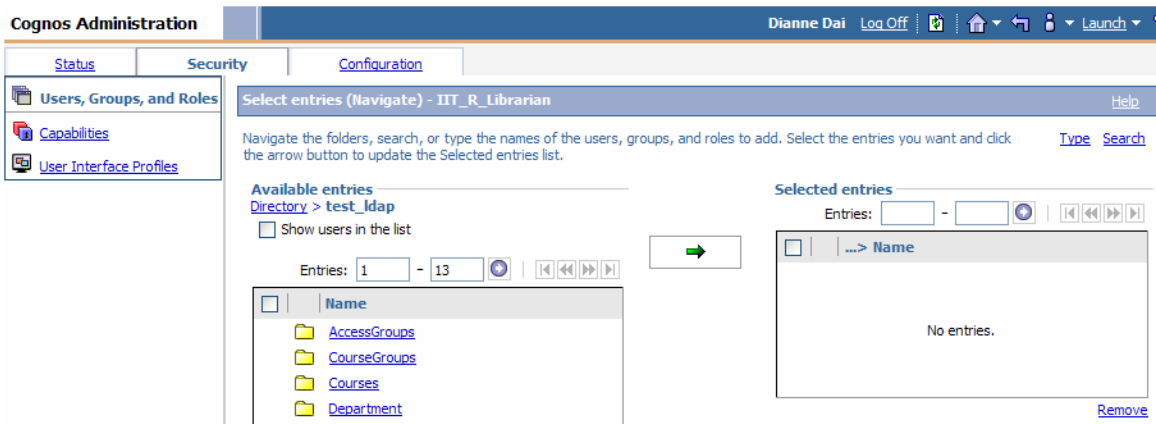
5. Click Members tab then click Add...



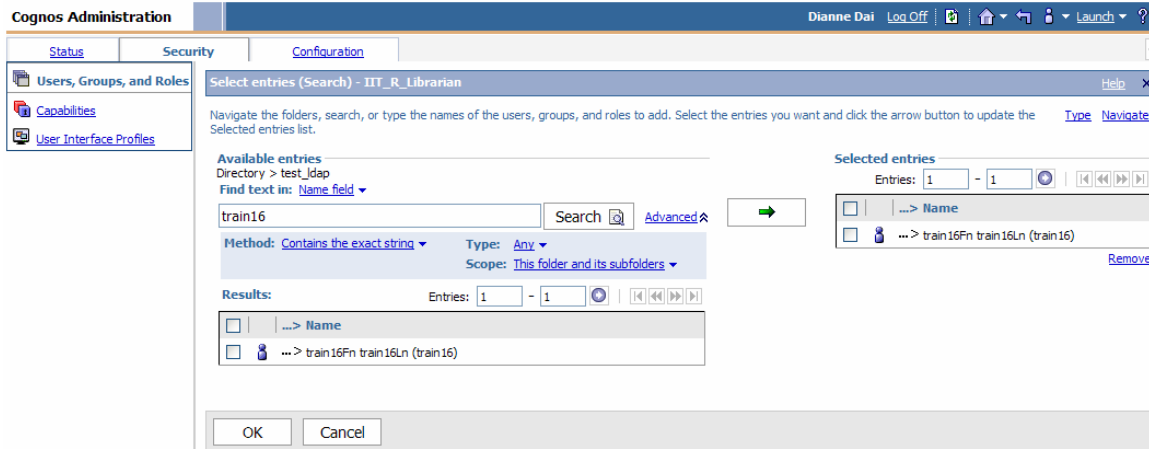
6. Click on LDAP namespace (this example is taken from Test and the namespace is called test\_ldap) that contains the desired user account



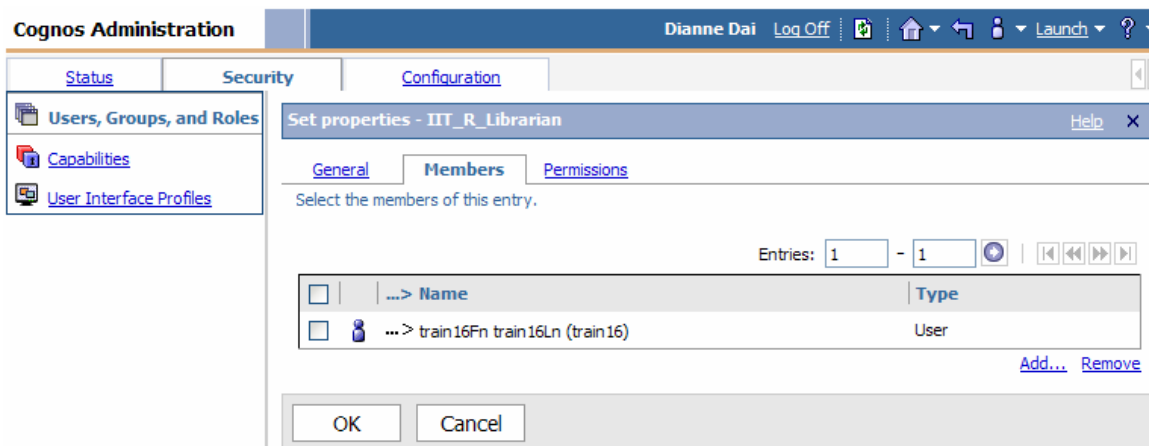
7. Click Search



- Use Search to locate the user account in the LDAP. Check the box next to the user account then click the green arrow to add the account to the right window. Click OK.



- The user is now a member of the IIT\_R\_Librarian role. Click OK.

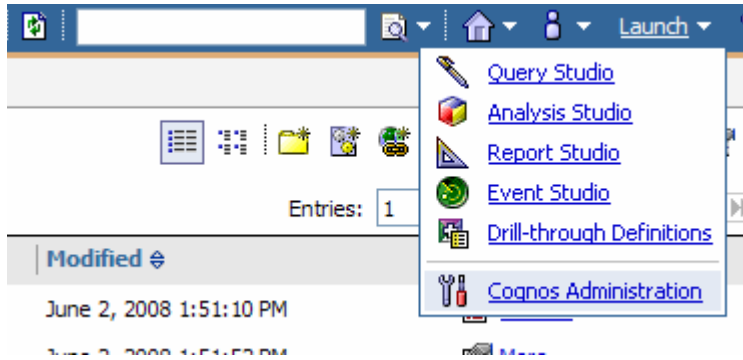


- Repeat steps 4 through 9 adding the same user account as a member of the desired package groups. The package groups all start with IIT\_P\_ and then the name the package the group has access to. For example the group called IIT\_P\_Active Registration has access to the Active Registration package. Librarians also need to be added to the package groups that end in \_L. For example the group IIT\_P\_Active Registration\_L is a special group that only Report Librarians are members of. These groups have write permission to the Report Libraries folder structure. The Librarian needs to be a member of both package groups, the one that ends in \_L and the one that doesn't, to have all of the required access permissions. All of the package groups are located in the Cognos namespace.

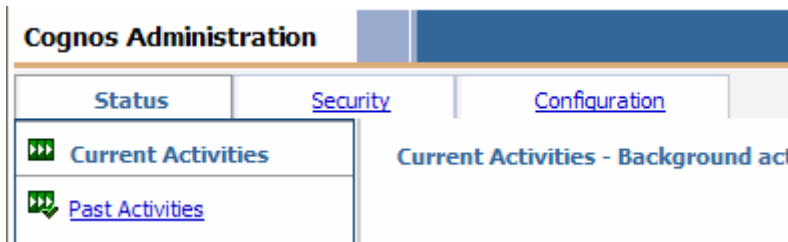
11. This completes the required steps to create a user with the Report Librarian role for the Cognos application.

### Steps to Add Portal Tabs to User Account

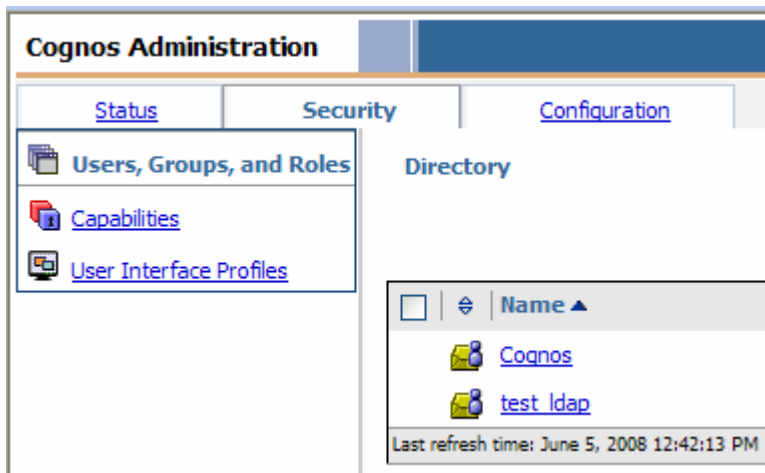
1. Go to Launch and click Cognos Administration



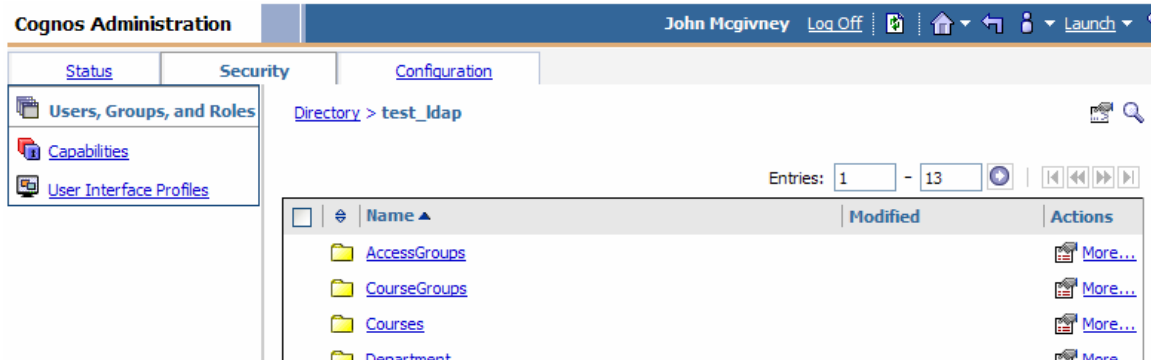
2. Click Security tab



3. In the Directory window click test\_ldap namespace (this example is taken from Test and the namespace is called test\_ldap) that contains the desired user account



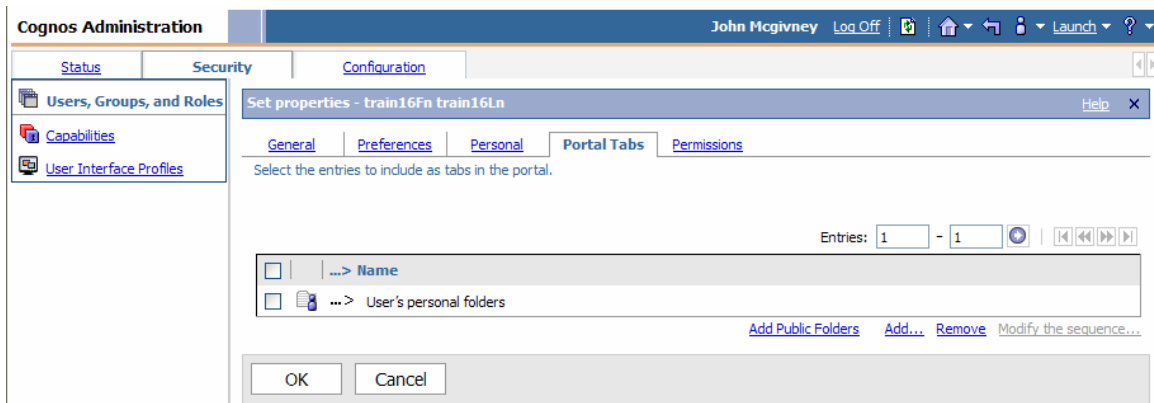
- Click on the search icon



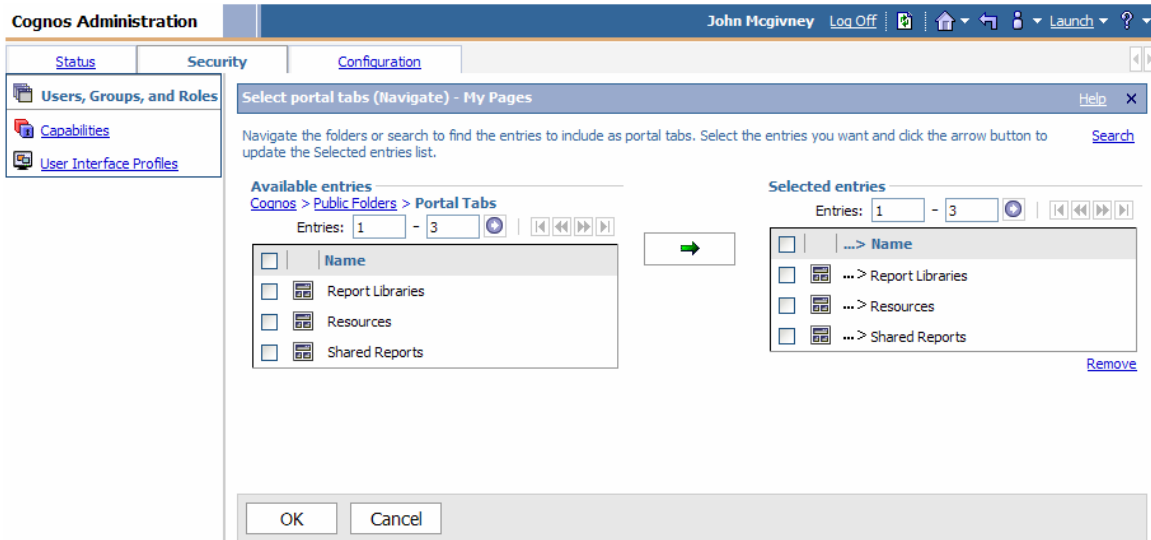
- Use search to locate the user that the portal tabs will be added to. Click the properties icon.



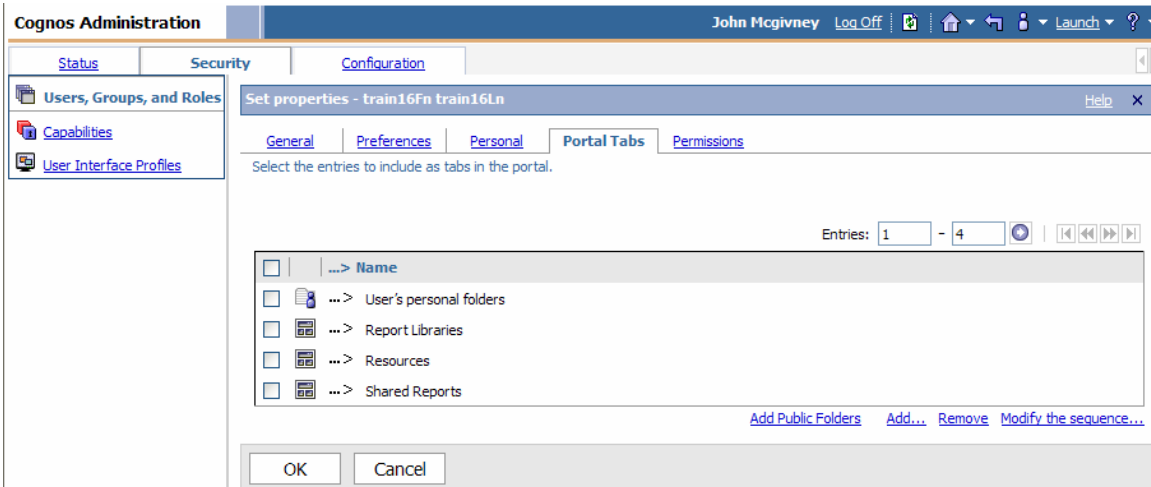
- Click the Portal Tabs tab and click Add...



- Browse into the Portal Tabs folder, place a check next to each tab on the left pane, click the green arrow to move the tabs to the right pane and click OK.



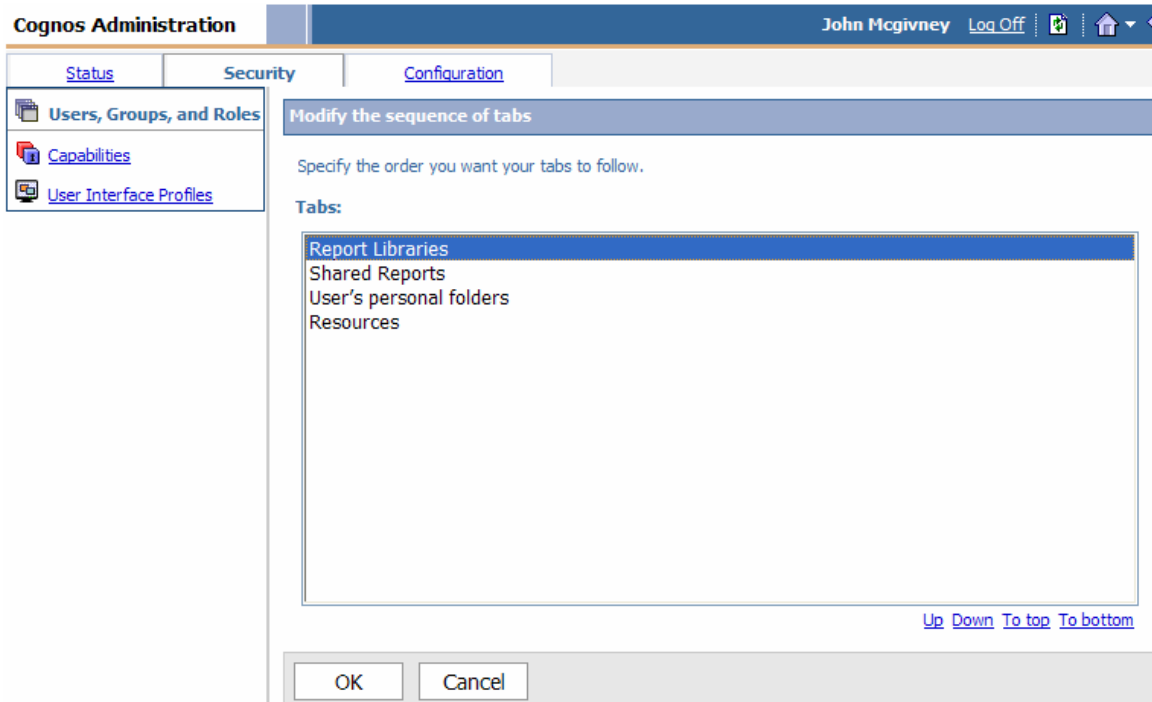
8. Click Modify the sequence...



9. Use the UP and Down buttons to order the tabs as follows:

- Report Libraries
- Shared Reports
- User's personal folders
- Resources

Click OK and click OK on the next screen.



10. The tab setup for the user account is complete.



## Folder Structure

The content of the Report Libraries, Shared Reports and Resources tabs is stored in the Public Folders directory structure. There are 5 root folders used by the portal. They're named Packages, Portal Published Content, Portal Tabs, Report Libraries and Shared Reports.

### Root folders for Portal tabs



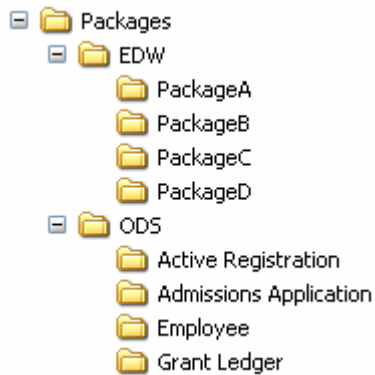
The folders displayed in the Report Libraries and Shared Reports tabs is controlled by assigning permissions to groups and adding users to these groups. The root level folder permissions are assigned to the IIT\_R\_ReportViewer role. This role is given Traverse access and allows its members to browser through the directory structure. All users are members of this role.

The root level folders have subfolders which are named the same as their corresponding package (*There are intermediate folders in most of the structures between the root level folders and the package named folders. In most of the structures the package folders are found under the ODS or EDW folders. ODS and EDW are the names of the two main data sources for reporting.*). Permissions from the root folder are overridden at this level and assigned to a package group. There are two package group types. The first type is named IIT\_P\_*Package Name* (*Package Name* is replaced with the actual name of the package) and is assigned Read, Execute and Traverse permissions. Users that require access to that particular package are added as members to these groups. The second type is named IIT\_P\_*Package Name*\_L. Only the Librarians are members of these groups because it has Read, **Write** (Write access the difference between the two groups), Execute and Traverse access to the directories required to manage the content of the Report Libraries tab.

**Public Folders\Packages** – Folder structure is used to store all of the Banner published packages. The Cognos Administrator is responsible for maintaining this folder structure, the packages and the corresponding security. When new Packages are created a folder is added to the directory structure. The new package will be stored in this folder.

*As a Report Librarian it is important to understand how the packages are organized in this structure. To create a report based on a package a report author will need access to the folder and the package contained therein. See the Setup User Account section for Step-by-Step directions for granting package access.*

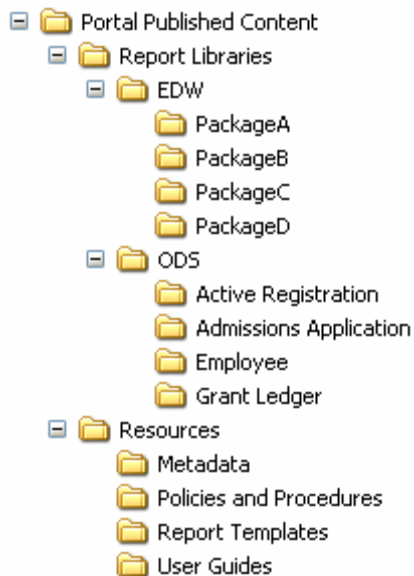
### Public Folders\Packages Folder Structure



**Public Folders\Portal Published Content** – Folder structure is used to store the source reports for the Report Libraries tab. Shortcuts to these reports are stored in the Public Folders\Report Libraries folder structure (This is a separate directory structure - **NOT** the Public Folders\Portal Published Content\Report Libraries folder structure). A Cognos Administrator is responsible for maintaining this folder structure and the corresponding security.

***As a Report Librarian, you are responsible for adding new reports to the Report Libraries tab. To add a report you will save the new report to this directory structure. The report will be stored in the folder that corresponds to the package it was created from. For example, if the report was created from the Active Registration package the report would be stored in the Portal Published Content\Report Libraries\ODS\Active Registration folder. Once the report is stored in the folder a short-cut to the report is created and stored in the Report Libraries structure.***

### Public Folders\Portal Published Content Folder Structure





**Public Folders\Portal Tabs** – Contains the portal tabs. A Cognos Administrator is responsible for maintaining this folder and the tabs within. The administrator will create, modify and control security for the portal tabs.

*As a Report Librarian you will add these tabs to a Cognos User during the User Account Setup process. See the Setup User Account section for Step-by-Step directions for adding Portal Tabs to an account.*

## Public Folders\Portal Tabs Folder Structure

 Portal Tabs

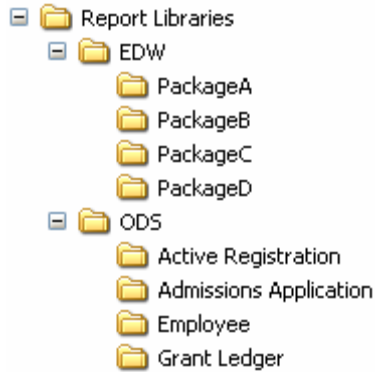
[Public Folders](#) > [Portal Tabs](#)

<input type="checkbox"/>	Name
<input type="checkbox"/>	 <a href="#">Report Libraries</a>
<input type="checkbox"/>	 <a href="#">Resources</a>
<input type="checkbox"/>	 <a href="#">Shared Reports</a>

**Public Folders\Report Libraries** – Folder structure contains all of the shortcuts to reports which are available on the Report Libraries tab. The source reports are located in the Portal Published Content directory structure. A Cognos Administrator is responsible for maintaining this folder structure and the corresponding security. When new Packages are created a folder is added to the directory structure to store the report short-cuts.

*As a Report Librarian you will create short-cuts to new reports and store them in the Report Libraries folder structure. The short-cut points to the source report that is stored in the Portal Published Content folder structure. For example, if the report was created from the Active Registration package the source report would be stored in the Portal Published Content\Report Libraries\ODS\Active Registration folder. Once the report is stored in the folder a short-cut to the report is created and stored in Report Libraries\ODS\Active Registration folder.*

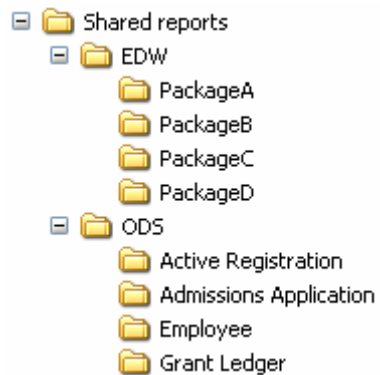
## Public Folders\Report Libraries Folder Structure



**Public Folders\Shared Reports** – Location to save reports that will be shared with other users. Both users must have access to the same package and the same folder. This is the source for the Shared Reports tab. Users directly access this folder structure through the Shared Reports tab. A Cognos Administrator is responsible for maintaining this folder structure and the corresponding security. When new Packages are created a folder is added to the directory structure to store reports.

*As a Report Librarian you will monitor the content of the shared folders. You will help organize the reports by creating sub-directories in the package named folders and remove unnecessary reports. Users also have access to store reports and create folders in this location. It is the librarian's responsibility to maintain order and organization to ensure the shared location does not get filled with erroneous content.*

### Public Folders\Shared Reports Folder Structure



### Step-by-Step Directions to Publish a Report to the Report Libraries tab

**Note:** Directions assume a report has been created and saved to a package folder that is located in the Public Folders\Portal Published Content folder structure. A report created from the Active Registration package is used in these directions.

1. Log-on to Cognos with a Librarian account

Log on

Please type your credentials for authentication.

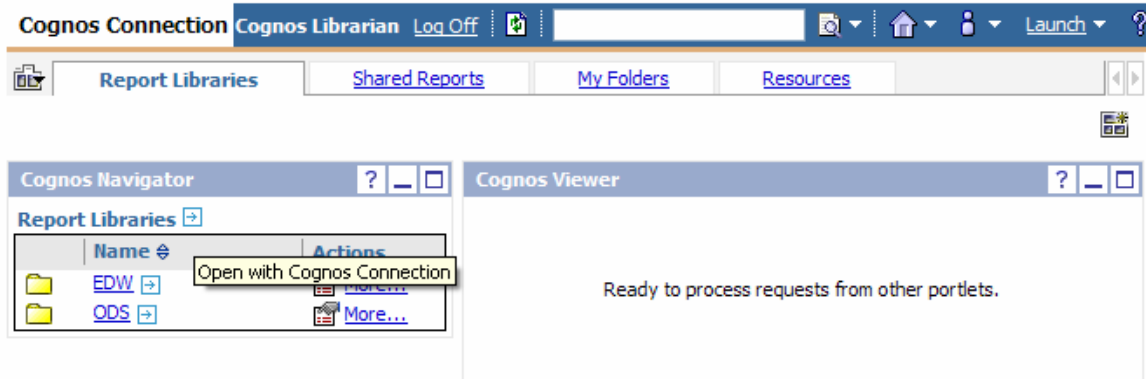
**Namespace:**  
prod\_ldap

**User ID:**

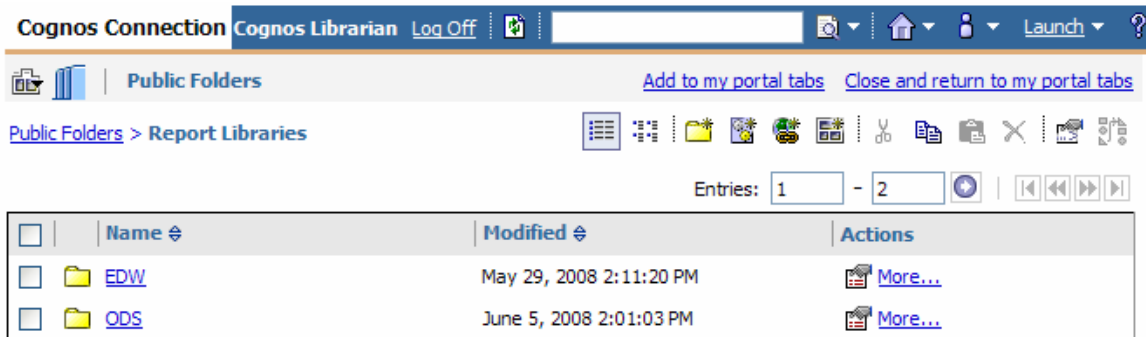
**Password:**

OK
Cancel

2. In the Cognos Navigator box click the **blue arrow** next to Report Libraries

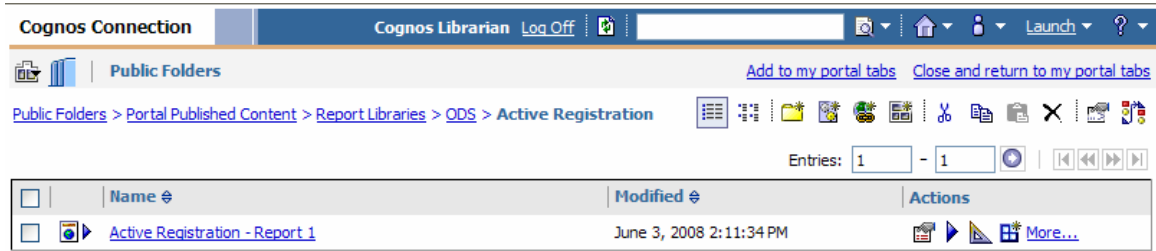


3. A new window opens into the Report Libraries folder structure.

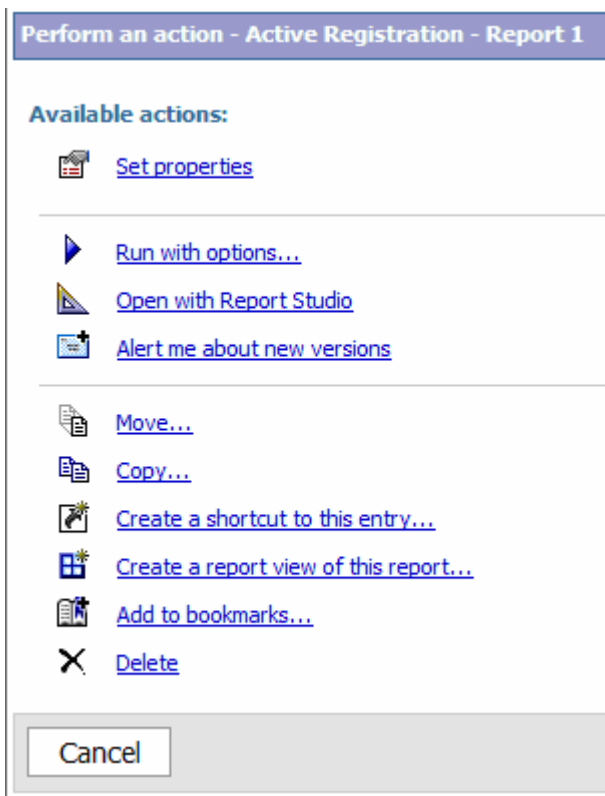


4. Browse to the report to be published in the Portal Published Content folder structure. Click **Public Folders**, click **Portal Published Content**, click **Report Libraries**, click **ODS** and click **Active Registration**. The source report should already be stored in this folder (The report Active Registration – Report 1 will be used in this example. Active Registration – Report 1 was

created from the Active Registration package.). Click the **More...** link to the far right of Active Registration – Report 1.



##### 5. Click **Create a shortcut to this entry...**



##### 6. Rename the shortcut to match the name of the source report. In this example the shortcut is renamed to Active Registration – Report 1. Click **Select another location...** link.

**Specify a name and description - New Shortcut wizard**

Specify a name and location for this entry. You can also specify a description and screen tip.

**Name:**

**Description:**


**Screen tip:**


**Location:**  
 Public Folders > Portal Published Content > Report Libraries > ODS > Active Registration  
[Select another location...](#) [Select My Folders](#)

7. Browse to the Report Libraries folder structure found at the root of Public Folders. Click **Public Folders**, click **Report Libraries**, click **ODS** and click **Active Registration**. Click **OK**.

**Select a location (Navigate) - Active Registration - Report 1** Help X

Navigate the folders or search to find where you want to place the entry. [Search](#)

 [Cognos](#) > [Public Folders](#) > [Report Libraries](#) > [ODS](#) > [Active Registration](#)

Entries:  -  

Name
No entries.

[New folder...](#)

8. The shortcut has been renamed and will be saved into the Public Folders\Report Libraries\ODS\Active Registration folder. Click **Finish**.

**Specify a name and description - New Shortcut wizard**

Specify a name and location for this entry. You can also specify a description and screen tip.

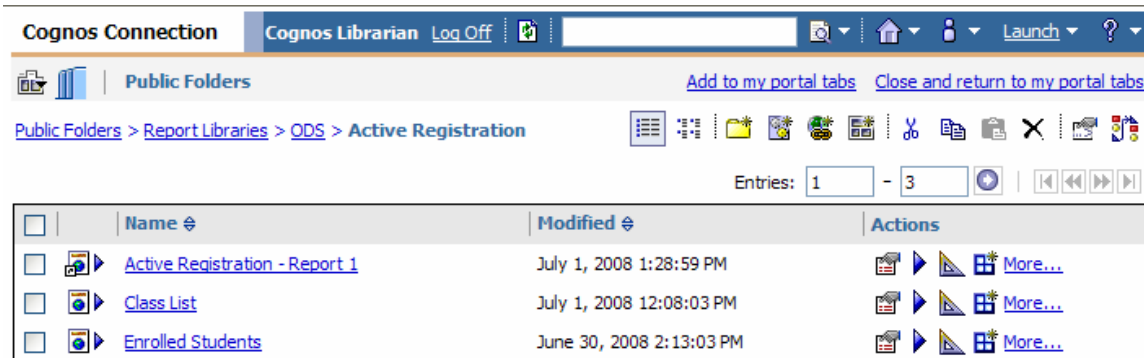
**Name:**

**Description:**

**Screen tip:**

**Location:**  
 Public Folders > Report Libraries > ODS > Active Registration  
[Select another location...](#) [Select My Folders](#)

- Browse to Public Folders\Report Libraries\ODS\Active Registration. The short-cut is now available and the report publishing process has been completed.



Note: A Report shortcut icon has a small arrow located in the bottom left corner.

